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Home Textiles

FACT FILE

Market Research Division
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Home Textiles

FAIRCHILD FACT FILE

Prepared by
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E. B. Gold, Manager
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HOME TEXTILES

Market Trends

One of the greatest stimulants for the industry in recent years has been the need to conserve energy and to keep warm with lowered thermostats. This has been felt in the market for window treatment products, fostering a demand for draperies with thermal linings and other energy-saving products, as well as in the market for bedcoverings with special properties.

Electric blankets are one of the most successful items in the energy-related boom. In 1979, 5.9 million units were sold at retail, exceeding sales of every blanket category except the lower priced nonwoven needlepunch type which reportedly hit about 19 million units. Synthetic thermals reportedly reached 4 million units; cotton thermals, 420 thousand units; blanket sacks or body wraps, 120 thousand units; sheet blankets, 4 million units; flocks, 1.3 million units; and high pile throws, 500 thousand units.

Comforters which have the versatility of serving as a bedspread by day and a blanket by night, saw increased sales of approximately 2.0% in 1979. According to the Wool Bureau, 250 thousand wool-filled comforters were sold during the '79 winter season.

The body wrap, still considered by some to be a passing fad, is now in its fourth year. Unit sales for the 1980 winter season are anticipated at about 5 million units.

New window treatments finding acceptance are the vinyl mini-blinds and insulating shades, as well as the thermal-lined draperies.

Other types of home textiles have shown gains due to fashion developments and changing consumer tastes. Greater interest in natural fibers, for example, has stimulated interest in all-cotton towels and sheets. While opinion is divided on the importance of designer names in merchandising home textiles, the industry must meet the need for constant change and development of new designs and colors.

While prints make up the bulk of sheet sales, interest in solid colors, as well as in white sheets, has been growing. Solid colors accounted for close to 10% of manufacturers' shipments of sheets in 1978, up from 8.4% in 1977 and at the present are probably well over 10% in view of consumer acceptance of the new deeper shades.

Towels have become an increasingly popular item in the domestics market, with sales moving steadily upward. Improved profit margins are leading retailers to feature towels in special promotions and bath shop areas. Demand is noted not only for all-cotton towels but for new fashion colors and tones.

GENERAL STATISTICS ON THE INDUSTRY

AT THE MANUFACTURER LEVEL

Every five years the U.S. Bureau of the Census conducts a complete census of all business activities in the U.S. Results of the most recent census of manufactures, covering operations in the year 1977, are now being released, and the following summarizes key findings compared with 1972 census counts. (In interim years, the Census Bureau conducts annual surveys of manufactures, which result in published estimates based on a representative sample of establishments. These estimates may differ from results of a complete canvass of all establishments and are, therefore, not included in the following industry data).

In 1977 there were a total of 980 companies primarily involved in the manufacture of home textiles from purchased fabrics, down from 1,058 companies reported in 1972. A total of 1,650 companies were primarily involved in the manufacture of curtains and draperies, representing a gain of 7.1% over the 1972 total of 1,540.

Not included in these figures are manufacturers who make home textiles as secondary products, and weaving and knitting mills who make home textile products from their own materials.

In evaluating the size of the industry, it must also be kept in mind that a very significant portion of the home textiles market consists of custom-made products. Because of the close relationship of hardware, blinds and shades, in the merchandising of textile window treatment lines, data on this classification has been included.

Curtains & Draperies
(SIC 2391)*

	1977	1972	% Change 1977/1972
Number of companies	1,650	1,540	+ 7.1%
Number of establishments**	1,712	1,593	+ 7.5
Employees, total (thous.)	31.7	33.9	- 6.5
Production workers (thous.)	27.2	29.5	- 7.8
Payroll (mil. $)	$ 224.7	$ 167.1	+34.5
Value added by manufacture (mil. $)#	407.3	302.3	+34.8
Value of shipments (mil. $)##	1,013.1	754.9	+34.2
Capital expenditures, new (mil. $)	7.2	9.5	-24.2

GENERAL STATISTICS ON THE INDUSTRY

Home Textiles Not Elsewhere Classified
(SIC 2392)*

	1977	1972	% Change 1977/1972
Number of companies	980	1,058	- 7.4%
Number of establishments**	1,051	1,111	- 5.4
Employees, total (thous.)	47.5	50.3	- 5.6
Production workers (thous.)	39.8	42.2	- 5.7
Payroll (mil. $)	$ 366.4	$ 281.9	+30.0
Value added by manufacture (mil. $)#	782.9	585.2	+33.8
Value of shipments (mil. $)##	2,294.0	1,526.9	+50.2
Capital expenditures, new (mil. $)	26.9	29.9	-10.0

Drapery Hardware & Blinds & Shades
(SIC 2591)*

	1977	1972	% Change 1977/1972
Number of companies	435	493	-11.8%
Number of establishments**	456	505	- 9.7
Employees, total (thous.)	13.6	12.1	+12.4
Production workers (thous.)	10.3	8.7	+18.4
Payroll (mil. $)	$ 145.6	$ 94.4	+54.2
Value added by manufacture (mil. $)#	345.0	198.2	+74.1
Value of shipments (mil. $)##	675.1	364.5	+85.2
Capital expenditures, new (mil. $)	16.7	9.9	+68.7

n.e.c. = not elsewhere classified

*SIC (Standard Industrial Classification) covers establishments primarily engaged in manufacturing curtains and draperies from purchased materials.

*SIC 2392 (officially designated "House Furnishings, n.e.c.") covers establishments primarily engaged in manufacturing home textiles from purchased materials, including towels, sheets, blankets, comforters, bedspreads, pillowcases, pads; also slip covers, tablecloths (fabric and plastic), pillows, mops, garment bags, etc. Blankets that are made in weaving mills are not included in this industry, nor are tufted bath mats or other tufted items.

*SIC 2591 covers establishments primarily engaged in manufacturing curtain and drapery rods, poles and fixtures, venetian blinds and other window blinds and shades, regardless of the materials used, except canvas shades and awnings.

**Each business location is counted as a separate establishment.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

(continued)

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes all items made by companies in this industry classification, including secondary products. It also includes miscellaneous income, receipts for contract work, etc. For the total value of shipments of household textiles made in SIC 2392 as well as in other industries, see tables on page 5 & 6. (Blankets made in weaving mills are an example of household textiles not included in the value of shipments of Industry 2392)

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC77-1-23E,
MC77-1-25B.

Employment

The effect on the home textiles industry of the sharp downturn in the construction of new housing and the general recession in the U.S. economy in 1980 is apparent in U.S. Bureau of Labor Statistics data on employment levels. Preliminary figures for the month of June 1980 indicate a decline of 8.2% in production worker employment compared with the same month a year ago in the curtain and drapery industry, and a 4.7% drop in other types of home textiles.

GENERAL STATISTICS ON THE INDUSTRY

Employment

Employment & Earnings in Home Textiles

	Monthly Average June 1980(p)	Monthly Average June 1979	% Chg.	Annual Average 1979	Annual Average 1978	% Chg.
Curtains & draperies (SIC 2391)*						
All employees (thous.)	27.8	29.4	-5.4%	30.2	30.8	-1.9%
Production workers (thous.)	23.4	25.5	-8.2	26.2	26.9	-2.6
Av. weekly earnings	$147.38	$145.13	+1.5	$139.88	$127.33	+9.9
Av. weekly hours	36.3	38.7	-6.2	37.3	36.8	+1.4
Home textiles, n.e.c. (SIC 2392)*						
All employees (thous.)	51.3	54.4	-3.9	51.8	51.6	+0.4
Production workers (thous.)	42.1	44.2	-4.7	43.2	42.9	+0.7
Av. weekly earnings	$164.35	$158.30	+3.8	$160.93	$148.99	+8.0
Av. weekly hours	37.1	38.8	-4.4	38.5	38.3	+0.5

(p) = preliminary
n.e.c. - not elsewhere classified

*Manufacturers are classified by industry under the Standard Industrial Classification system (SIC), determined by the principal product made. See previous footnotes for the industry definitions.

While relatively few plants operating in the home textiles classifications have 100 or more employees, these plants account for upwards of 60% of the total value of shipments, according to the U.S. Bureau of the Census and trade sources.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

GENERAL STATISTICS ON THE INDUSTRY

Employment

Manufacturers of Home Textiles by Employment Size, 1977

	Curtains & Draperies (SIC 2391)*		Home Textiles, n.e.c. (SIC 2392)*		Drapery Hardware & Blinds & Shades (SIC 2591)*	
	No.	%	No.	%	No.	%
Total establishments**	1,540	100.0%	959	100.0%	423	100.0%
Number by employment size:						
1 to 9	1,008	65.5	439	45.8	297	70.2
10 to 19	238	15.5	150	15.6	56	13.3
20 to 49	181	11.7	169	17.6	29	6.9
50 to 99	63	4.1	85	8.9	17	4.0
100 to 249	33	2.1	84	8.7	9	2.1
250 to 499	13	0.8	25	2.6	9	2.1
500 or more	4	0.3	7	0.7	6	1.4

n.e.c. = not elsewhere classified.
* For definitions of SIC codes, see page 3.
** Includes only establishments with payrolls.

Source: U.S. Bureau of the Census, *County Business Patterns, 1977*.

Employment & Share of Shipments of Home Textiles in Large Plants - 1978, 1979

	Number of Plants		% of Total Shipments Accounted for by Plants With 100+ Employees
	With 20+ Employees	With 100+ Employees	
Curtains & draperies (SIC 2391)*			
1978	327	75	60%
1979(e)	347	77	60
Home textiles, n.e.c. (SIC 2392)*			
1978	337	100	65%
1979(e)	354	102	65
Drapery hardware & blinds & shades (SIC 2591)*			
1978	110	23	73%
1979(e)	122	24	73

n.e.c. = not elsewhere classified
* For definitions of SIC numbers, see page 3.

Source: *Sales & Marketing Management*, "Survey of Industrial Buying Power," 1979 & 1980 editions. (All rights reserved.)

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Key Business Ratios in the Home Textiles Industry, 1978
(Median Results)

	Curtains & Draperies (SIC 2391)*	Home Textiles, n.e.c. (SIC 2392)*	Drapery Hardware & Blinds & Shades (SIC 2591)*
Number of firms reporting	190	174	68
Current assets to current debt (times)	2.37	1.89	2.35
Net profits on net sales (percent)	3.94	2.85	4.14
Net profits on net worth (percent)	20.35	20.84	29.50
Net sales to net worth (times)	5.01	5.55	5.56
Net sales to net working capital (times)	6.11	7.33	6.07
Average collection period (days)	32	36	34
Net sales to inventory (times)	10.0	7.7	10.0

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
1979 Key Business Ratios.
(All rights reserved.)

*For definitions of SIC numbers, see page 3.

GENERAL STATISTICS ON THE INDUSTRY

By Region

Home Textiles Industry
By Geographic Region and Leading States, 1977

	Number of Establishments		Value of Shipments	
	Total	20 or More Employees	Mil. of $	% of Total**
Curtains & draperies (SIC 2391)*				
Total U.S.	1,712	324	$1,013.1	100.0%
New England				
Massachusetts	49	28	98.8	9.7
Connecticut	10	4	15.5	1.5
Middle Atlantic				
New York	175	41	163.3	16.1
New Jersey	39	5	16.5	1.6
Pennsylvania	70	18	36.5	3.6
East North Central				
Ohio	47	11	17.1	1.7
Indiana	39	12	44.9	4.4
Illinois	80	7	16.0	1.6
Michigan	31	5	5.8	0.6
Wisconsin	20	3	6.0	0.6
West North Central				
Minnesota	26	5	10.8	1.1
Missouri	29	6	9.1	0.9
South Atlantic				
Maryland	18	2	4.2	0.4
West Virginia	5	2	(D)	--
North Carolina	33	17	140.0	13.8
South Carolina	21	7	26.9	2.6
Georgia	35	14	52.0	5.1
Florida	133	8	23.8	2.3
East South Central				
Tennessee	17	4	(D)	--
Alabama	13	2	7.4	0.7
West South Central				
Louisiana	13	2	4.9	0.5
Oklahoma	21	5	19.3	1.9
Texas	109	17	75.2	7.4
Mountain				
Idaho	7	2	(D)	--
Arizona	30	4	6.5	0.6
Utah	18	3	3.7	0.4
Nevada	11	2	(D)	--
Pacific				
Washington	47	10	11.9	1.2
Oregon	32	7	11.3	1.1
California	389	56	110.5	10.9
Hawaii	7	2	4.5	0.4

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

Home Textiles Industry
By Geographic Region and Leading States, 1977 (continued)

	Number of Establishments		Value of Shipments	
	Total	20 or More Employees	Mil. of $	% of Total**
Home textiles, n.e.c. (SIC 2392)*				
Total U.S.	1,051	403	$2,294.0	100.0%
New England				
Massachusetts	33	13	39.0	1.7
Connecticut	14	8	18.0	0.8
Middle Atlantic				
New York	272	85	356.2	15.5
New Jersey	62	31	141.7	6.2
Pennsylvania	54	21	65.0	2.8
East North Central				
Ohio	28	8	71.5	3.1
Indiana	17	7	21.6	0.9
Illinois	68	30	116.4	5.1
Michigan	19	2	6.0	0.3
West North Central				
Minnesota	11	8	16.3	0.7
Iowa	4	2	(D)	--
Missouri	15	7	15.5	0.7
South Dakota	7	4	(D)	--
Kansas	8	2	4.2	0.2
South Atlantic				
Maryland	12	3	6.0	0.3
Virginia	9	6	75.8	3.3
North Carolina	41	24	305.5	13.3
South Carolina	19	13	200.7	8.7
Georgia	44	27	287.0	12.5
Florida	34	11	14.6	0.6
East South Central				
Kentucky	10	5	(D)	--
Tennessee	11	6	20.9	0.9
Alabama	19	9	205.4	8.9
Mississippi	11	4	22.1	1.0
West South Central				
Oklahoma	8	3	29.3	1.3
Texas	35	11	33.8	1.5
Pacific				
California	123	39	145.3	6.3

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

Home Textiles Industry
By Geographic Region and Leading States, 1977 (continued)

	Number of Establishments		Value of Shipments	
	Total	20 or More Employees	Mil. of $	% of Total**
Drapery Hardware & Blinds & Shades (SIC 2591)*				
Total U.S.	456	85	$675.1	100.0%
New England				
Rhode Island	5	1	(D)	--
Connecticut	10	3	(D)	--
Middle Atlantic				
New York	84	12	41.2	6.1
New Jersey	24	4	41.1	6.1
Pennsylvania	19	3	6.7	1.0
East North Central				
Illinois	25	6	(D)	--
Michigan	13	4	(D)	--
Wisconsin	5	4	(D)	--
South Atlantic				
Maryland	7	3	37.6	5.6
Virginia	10	3	7.6	1.1
Georgia	11	4	(D)	--
Florida	29	4	10.2	1.5
East South Central				
Kentucky	2	1	(D)	--
Tennessee	6	3	(D)	--
West South Central				
Texas	38	5	14.9	2.2
Mountain				
Utah	4	2	(D)	--
Pacific				
California	67	14	75.5	11.2

(D) = Withheld to avoid disclosing figures for additional companies.
n.e.c. = not elsewhere classified
* For full definitions of SIC numbers, see page 3.
** Percent distribution does not equal 100.0% due to disclosures.

Source: U.S. Department of Commerce,
Bureau of the Census,
1977 Census of Manufactures,
Industry Series.

PRODUCTION

The U.S. Bureau of the Census issues quarterly reports on production and shipments of sheets, pillowcases and towels, based on surveys among all U.S. firms engaged in the manufacture of these products from purchased fabrics, as well as from fabrics woven or knit by the same firm.

In the first half of 1980, production of sheets and pillowcases were ahead of output in the same 1979 period--sheets, up 7.5%; pillowcases, up 4.5%. Production of crib sheets lagged by 0.9%, and of terry towels (finished) by 1.6%.

For the year 1979, however, crib sheets showed a gain of 5.5% in output compared with the previous year, but remained far below the peak level reached in 1970. Production of flat sheets, which had registered a strong gain in 1978, lost ground in 1979, as did fitted sheets.

Output of terry woven towels (finished) for all used reached a record high of close to 52 million dozen in 1979, led by strong gains in production of terry woven kitchen towels. Output of huck and crash towels registered a sharp decline (-27.5%) between 1978 and 1979.

Production of Sheets, Pillowcases & Towels--1977, 1978, 1979
(In Thousands of Dozens)

	Quantity			% Change	% Change
	1979(p)	1978	1977	1979/1978	1978/1977
Sheets and pillowcases, total	30,809	31,190	30,866	- 1.2%	+ 1.0%
Crib-size sheets	695	659	632	+ 5.5	+ 4.3
Other sheets	15,861	16,804	16,284	- 5.6	+ 3.2
By type:					
Flat sheets	9,766	10,310	9,711	- 5.3	+ 6.2
Fitted sheets	6,095	6,494	6,573	- 6.1	- 1.2
Pillowcases, total	14,253	13,727	13,950	+ 3.8	- 1.6
Towels:					
Finished terry woven, total	51,732	49,256	46,283	+ 5.0	+ 6.4
By Type:					
Sheared	16,658	16,869	15,306	- 1.2	+10.2
Non-sheared	35,074	32,387	30,977	+ 8.3	+ 4.5
By kind:					
Kitchen	6,126	5,408	4,722	+13.3	+14.5
Bath size	24,460	22,379	21,238	+ 9.3	+ 5.4
Hand, face, quest, fingertip	18,576	18,498	17,238	+ 0.4	+ 7.3
All other including larger than bath (e.g., queen/king bath towels, bath sheets, bath mats)	2,569	2,971	2,907	-13.5	+ 2.2
Huck and crash towels, incl. dish towels	49,141	67,747	69,797	-27.5	- 2.9
Terry washcloths	22,987	24,940	24,091	- 7.8	+ 3.5
Terry cloth sold by the yard	24,572*	29,077*	24,067	-15.5	+20.8

(p) = preliminary
* In thousands of linear yards

Source: U.S. Bureau of the Census (and The American Textile Manufacturers' Institute), Current Industrial Reports, Sheets, Pillowcases & Towels MQ-23X.

PRODUCTION

Summary of Production of Sheets, Pillowcases & Towels, 1968-1979
(In Thousands of Dozens)

Year	Sheets Crib	Sheets Flat	Sheets Fitted	Pillowcases	Terry Woven Towels (Finished)
1979(p)	695	9,766	6,095	14,253	51,732
1978	659	10,310	6,494	13,727	49,256
1977	632	9,711	6,573	13,950	46,283
1976	732	9,836	6,968	13,964	45,556
1975	683	9,092	6,344	12,337	41,442
1974	691	10,093	5,701	13,755	42,153
1973	686	10,044	6,404	14,381	47,558
1972	1,028	10,345	7,213	14,116	47,675
1971	1,198	9,510	6,586	13,381	45,319
1970	1,327	9,029	6,503	13,768	46,599
1969	1,141	8,217	5,835	12,842	47,039
1968	894	9,271	5,759	13,432	48,863

(p) = preliminary

Source: U.S. Bureau of the Census (and The American Textile Manufacturers' Institute), Current Industrial Reports (MQ-23X).

Production of Sheets & Pillowcases by Fabric Type, 1978, 1979
(In Thousands of Dozens)

	1979(p)		1978	
	Quantity	Percent	Quantity	Percent
Flat sheets	9,766	100.0%	10,310	100.0%
Polyester/cotton blends:				
Less than 180 count	5,272	54.0	5,462	53.0
180 count & greater	4,268	43.7	4,618	44.8
All other fabrics	226	2.3	230	2.2
Fitted sheets	6,095	100.0	6,494	100.0
Polyester/cotton blends:				
Less than 180 count	3,203	52.6	3,460	53.3
180 count & greater	2,737	44.9	2,877	44.3
All other fabrics	155	2.5	157	2.4
Pillowcases	14,253	100.0	13,727	100.0
Polyester/cotton blends				
Less than 180 count	7,345	51.5	7,033	51.2
180 count & greater	6,586	46.2	6,340	46.2
All other fabrics	322	2.3	354	2.6

(p) = preliminary

Source: U.S. Bureau of the Census (and The American Textile Manufacturers' Institute), Current Industrial Reports (MQ-23X).

PRODUCTION

Current data on production of other types of home textiles, not covered in U.S. Bureau of the Census reports, is available from the National Cotton Council of America. Following are estimates on total production (all types of fabrics) for the years 1978 and 1979 from this source. (It should be noted that the Census Bureau covers detailed information on product shipments in the 1977 census of manufactures reports. See the section on SHIPMENTS.)

Production of Selected Home Textiles, by Type—1978, 1979

	Unit of Measure	1979(p)	1978	% Change 1979/1978
Curtains, excluding shower	1,000 sets	124,769	122,396	+ 1.9
Lace		1,464	1,509	- 3.0
Other		123,305	120,887	+ 2.0
Cafe, tiered & cottage		67,913	66,581	+ 2.0
Ruffled		5,971	5,854	+ 2.0
Shortie drapes		12,618	12,371	+ 2.0
Tailored		36,803	36,081	+ 2.0
Drapery, upholstery & slip cover fabrics	1,000 lin. yds.	948,275	952,760	- 0.5
Drapery fabrics		545,585	557,966	- 2.2
Mainly woven		470,332	481,005	- 2.2
Lining, woven		75,253	76,961	- 2.2
Upholstery & slip covers fabrics		402,690	394,794	+ 2.0
Coated		88,592	86,855	+ 2.0
Knit		25,692	25,188	+ 2.0
Woven		62,800	61,667	+ 2.0
Uncoated, woven		314,098	307,939	+ 2.0
Window shades, woven, plastic & non-woven	1,000 units	49,682	53,422	- 7.0
Slip covers, furniture, excluding plastic	1,000 units	9,278	10,915	-15.0
Comforters & quilts	1,000 units	14,025	12,344	+13.6
Bedspreads	1,000 units	40,056	39,091	+ 2.5
Tailored		19,263	18,793	+ 2.5
Tufted		10,799	10,484	+ 3.0
Woven		9,994	9,814	+ 1.8
Jacquard		7,163	7,092	+ 1.0
Other woven		2,831	2,722	+ 4.0
Mattress coverings, woven & plastic	1,000 units	3,237	3,205	+ 1.0
Pads, quilted, excluding fillings	1,000 units	41,115	39,728	+ 3.5
Bassinet & crib, woven & plastic		5,856	5,798	+ 1.0
Furniture, woven		6,720	6,222	+ 8.0
Mattress, woven		28,539	27,708	+ 3.0
Pillows & cushions, excluding fillings, woven	1,000 units	60,371	58,918	+ 2.5
Bed		37,684	37,311	+ 1.0
Decorative		22,687	21,607	+ 5.0

(continued)

Production of Selected Home Textiles, by Type—1978, 1979
(continued)

	Unit of Measure	1979(p)	1978	% Change 1979/1978
Tablecloths & napkins, excluding linen & unsupported plastic	1,000 sq. yds.	109,061	105,884	+ 3.0
Damask, woven		15,998	15,993	*
Lace		16,426	16,642	- 1.0
Other woven		76,587	73,249	+ 4.6
Coated		23,742	22,707	+ 4.6
Uncoated		52,845	50,542	+ 4.6

(p) = preliminary
* = less than 0.1%

Source: National Cotton Council of America, Cotton Counts Its Customers, (1980 Edition).

Production of blankets is estimated on the basis of yardage in blanketing reported by U.S. mills.

Estimated Production of Blankets in the U.S.—1977, 1978

	Units* (in thous.) 1978	1977	% Change 1978/1977
Production of blankets, total**	82,814	83,928	- 1.3
Wholly or chiefly wool	1,770	1,609	+10.0
Crib, thermal and other	na	5,409	--
Canton flannel	18,864	17,984	+ 4.9
Wholly or chiefly synthetic***	31,090	29,463	+ 5.5
Acrylic & modacrylic	18,425	17,817	+ 3.4
Polyester	12,665	11,646	+ 8.7

na = not available
*Units were estimated based on production of blanketing reported in yardage and assuming 2.4 linear yards per blanket.
**Includes other napped fabrics
***Includes woven and non-woven blanketing

Source: Based on U.S. Bureau of the Census Current Industrial Reports on Broadwoven Fabrics (Gray), Series, MQ-22T(78)-5.

PRODUCTION

Preliminary figures for the year 1979 on domestic production of blankets, in terms of linear yards, have been published by the National Cotton Council of America and are shown below, together with comparisons for 1978.

Production of Blankets & Blanketing, 1978; 1979
(Thousands of linear yards)

	1979(p)	1978	% Change
Blankets & blanketing, total	88,802	96,663	-8.1%
Bed	80,554	87,660	-8.1
Thermal woven	20,291	21,626	-6.2
Other woven & nonwoven	60,262	66,034	-8.7
Crib & receiving	8,248	9,003	-8.4
Thermal woven	1,038	1,137	-8.7
Other woven & nonwoven	7,210	7,866	-8.3

(p) = preliminary

Source: National Cotton Council of America, Cotton Counts Its Customers, (1980 Edition).

MATERIALS CONSUMED IN PRODUCTION

The 1977 census of manufactures report on the home textiles industry included quantity and cost of materials consumed or put into production by plants classified in this industry. Following are findings compared with the previous census data, covering the year 1972.

MATERIALS CONSUMED IN PRODUCTION

Materials Consumed by Kind: 1972, 1977

Industry	Unit of Measure	1977 Quantity (mils.)	1977 Delivered Cost (mil.$)	1972 Quantity (mils.)	1972 Delivered Cost (mil.$)
Curtains & draperies (SIC 2391)*					
Materials, containers, supplies, total	--	--	$ 542.5	--	$374.7
Broadwoven fabrics:					
Cotton	lin.yards	118.0	113.3	166.0	102.0
Rayon & acetate	" "	nr	85.8	117.4	74.7
Nylon	" "	nr	11.0	15.2	5.3
Polyester	" "	133.8	101.6	119.0	65.4
Other	" "	55.2	41.4		
Plastics	--	nr	1.1	nr	nr
All other materials, containers, etc.	--	--	40.1	--	29.7
Type not specified	--	--	148.2	--	97.6
Home textiles (SIC 2392)*					
Materials, containers, supplies, total	--	--	1,392.6	--	863.2
Broadwoven fabrics:					
Cotton	lin.yards	480.1	401.9	603.6	307.9
Rayon & acetate	" "	82.9	33.3	87.5	46.0
Nylon	" "	87.9	25.3	15.8	5.8
Polyester	" "	412.1	327.5	177.9	121.6
Other	" "	61.3	61.9		
Plastics coated, impregnated or laminated fabs.	" "	75.4	57.9	49.9	29.3
Man-made fibers (staple & tow)	pounds	97.7	33.3	44.7	20.9
Plastics products in the form of sheets, rods, etc.	--	nr	26.8	nr	nr
All other materials, containers, etc.	--	--	227.1	--	195.9
Type not specified	--	--	197.6	--	135.8

*See industry definitions on page 3.
nr = not reported.

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Industry Series MC77-1-23E.

MATERIALS CONSUMED IN PRODUCTION

Consumption of all types of fibers in curtains, according to data compiled by the Textile Economics Bureau, came to 88.7 million pounds in 1978--almost 40% higher than the total reported five years earlier. Fiber consumption in draperies and upholstery, on the other hand, which totaled 599 million pounds in 1978, was 14% below the total reported for 1974.

In the five year period, fiber consumption in bedspreads and quilts was up 40.5%; in blankets, up 5.9%; in towels, up 23.1%; in sheets and other bedding, up 27%. Fiber consumption of other, miscellaneous household textiles held about even in this span.

Man-made fibers dominate in all end uses except sheets and towels. With growing consumer interest in natural fibers, and improved no-iron fabric characteristics, cotton is expected to increase its share of fiber consumption in sheets.

Contrary to expectations, gains have been registered in the use of rayon and acetate in the curtain, drapery and upholstery categories.

Consumption of Fibers in Selected Home Textiles--1977, 1978
(Millions of Pounds)

	1978	1977	% Change 1978/1977
Curtains, total[1]	88.7	74.2	+19.5%
Man-made fibers, total	78.1	62.2	+25.6
Rayon & acetate	22.8	18.3	+24.6
Other man-made fibers	55.3	43.9	+26.0
Cotton	10.6	12.0	-11.7
Drapery & Upholstery, total[2]	599.0	581.7	+ 3.0
Man-made fibers, total	389.7	366.6	+ 6.3
Rayon & acetate	181.3	160.2	+13.2
Other man-made fibers	208.4	206.4	+ 1.0
Cotton	193.2	201.7	- 4.2
Wool	16.1	13.4	+20.1
Bedspread & quilts, total[3]	158.1	153.9	+ 2.7
Man-made fibers, total	81.8	75.1	+ 8.9
Rayon & acetate	9.5	12.7	-25.2
Other mad-made fibers	72.3	62.4	+15.9
Cotton	76.3	78.8	- 3.2
Blankets & blanketing, total[4]	126.7	130.3	- 2.8
Man-made fibers, total	112.2	115.7	- 3.0
Rayon & acetate	0.1	0.2	-50.0
Other man-made fibers	112.1	115.5	- 2.9
Cotton	8.5	8.8	- 3.4
Wool	6.0	5.8	+ 3.4
Towels & toweling, total[5]	324.7	300.9	+ 7.9
Man-made fibers, total	28.0	27.6	+ 1.4
Rayon & acetate	--	0.2	--
Other man-made fibers	28.0	27.4	+ 2.2
Cotton	296.7	273.3	+ 8.6

(continued)

Consumption of Fibers in Selected Home Textiles--1977, 1978

(Millions of Pounds)
(continued)

	1978	1977	% Change 1978/1977
Sheets & other bedding, total[6]	524.4	526.4	- 0.4
Man-made fibers, total	237.0	242.6	- 2.3
Rayon & acetate	16.2	14.9	+ 8.7
Other man-made fibers	220.8	303.1	-27.1
Cotton	287.4	283.8	+ 1.3
Miscellaneous household textiles, total 7	58.5	52.6	+11.2
Man-made fibers, total	29.3	25.2	+16.3
Rayon & acetate	4.0	1.7	+135.3
Other man-made fibers	25.3	23.5	+ 7.7
Cotton	29.2	27.4	+ 6.6

1. Lace, ruffled, cottage, cafe and tiered types included.
2. Includes furniture slipcovers, vinyl-coated fabrics for upholstery and olefin and saran webbing for outdoor furniture. Also includes the backing and headers of various drapery fabrics.
3. Includes tailored and throw spreads, both tufted and woven, as well as the backing of those goods.
4. Includes woven, knitted, needle-punched and flocked full-sized and crib blankets and electric blanket shells as well as the woven acetate or nylon filament yarn bindings. Sizable poundages of rayon, acrylic, nylon and wool waste are also included.
5. Includes woven hand, bath, dish and other towel types.
6. Sheets includes pillowcases. Other bedding includes the outside cover of quilted pads, mattress pads, mattresses and innersprings, cots and sleeping bags.
7. Includes woven and lace napery, such as tablecloths, napkins and doilies; oil cloth, shower curtains, window shades and stamped art goods for embroidery. Also includes man-made fibers used in radio and television grille cloth and insect screening and netting.

Source: Textile Economics Bureau, Inc.,
Textile Organon, (November 1979).

SHIPMENTS

The complete census of manufactures, compiled every five years by the U.S. Bureau of the Census and most recently covering the year 1977, indicates that the total value of shipments of all types of home textiles as covered in this Fact File is currently in the area of $6 billion. This includes shipments for import and the institutional market, as well as for the retail market.

Preliminary data on an incomplete list of product classifications thus far available from the 1977 census, compared with findings in the 1972 census, are shown below:

Value of Reported Shipments of Home Textiles by All Producers, 1972, 1977
(Millions of Dollars)

	1977	1972	% Change 1977/1972
Reported total*	$4,099.9	$2,862.2	**
Curtains & draperies, except lace	936.7	626.2	+ 49.6
Bedspreads & bedsets	400.3	312.5	+ 28.1
Sheets & pillowcases, total	906.3	634.8	+ 42.8
Made in weaving mills: chiefly cotton	--	77.8	--
Made in weaving mills: chiefly man-made fibers	426.8	238.5	+ 78.9
Made from purchased fabrics	479.5	318.5	+ 50.5
Blankets:			
Wool & chiefly wool	17.8	13.0	+ 36.9
Man-made & chiefly man-made fibers	(D)	41.6	--
Cotton & chiefly man-made fibers	(D)	13.5	--
Electric bedcoverings	(D)	44.4	--
Towels & washcloths	693.0	403.0	+ 72.0
Made in weaving mills	416.4	319.0	+ 30.5
Made from purchased fabrics	276.6	84.0	+229.3
Other home textiles (such as shower curtains, comforters & quilts, tablecloths, napkins, placemats, pillows, slip covers, mops & dusters, bags for laundry, shoes & wardrobe)	1,145.8	773.2	+ 48.2
(Shipments of related products, not included in the total)			
Drapery hardware, blinds & shades	329.7	160.4	+105.5
Window shades & accessories	140.3	80.9	+ 73.4
Venetian blinds	89.6	29.1	+207.9
Other & types not specified	45.7	40.9	+ 11.7

*It should be noted that unspecified products, such as bath mats and rugs made in floor covering mills, are not included in this listing.
**Not shown as totals are not comparable due to (D).
(D) Withheld to avoid disclosure of operations of individual companies.

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Industry Series and Preliminary Reports.

SHIPMENTS

Updated information on shipments of sheets and pillowcases, towels and washcloths, is issued by the U.S. Bureau of the Census in the quarterly Current Industrial Reports. The 1977 total reported in the CIR differs somewhat from that reported in the 1977 complete census of manufactures, since the CIR is based on a sample survey. The CIR reported total value of shipments of sheets and pillowcases in 1977 at $878.6 million (compared with $906.3 million in the Census); towels and washcloths (woven), at $698.4 million (compared with $693.0 million).

In order to provide the latest available information, and the detailed data provided in the CIR reports, the following table is based on that source.

Quantity & Value of Shipments by All Producers, 1977-1979

	Quantity (Thous. dozens)			Value (Mil.$)		
	1979(p)	1978	1977	1979(p)	1978	1977
Sheets and pillowcases	31,217	32,089	31,160	$993.8	$946.4	$859.2
Crib size sheets	662	650	655	15.7	13.1	13.0
Total sheets	16,296	16,859	16,624	760.3	725.7	661.0
By type:						
Flat sheets	9,981	10,169	9,821	462.3	437.2	392.9
Polyester/cotton blends:						
Less than 180 count	5,445	5,640	5,468	215.6	208.5	186.9
180 count and greater	4,338	4,355	4,185	235.5	220.2	198.1
All other fabrics	198	174	168	11.3	8.5	7.9
Fitted sheets	6,315	6,690	6,803	297.8	288.5	268.1
Polyester/cotton blends:						
Less than 180 count	3,301	3,650	3,787	135.3	137.8	127.4
180 count and greater	2,886	2,938	2,906	154.9	144.9	135.6
All other fabrics	128	102	110	7.6	5.9	5.2
By size:						
King	1,129	1,124	1,057	91.4	85.7	75.8
Queen	1,985	2,004	1,861	134.1	123.9	105.6
Full	6,484	6,834	6,803	292.8	285.2	263.8
Twin	6,274	6,380	6,517	229.3	215.5	205.1
Single and smaller	424	317	386	12.5	15.4	10.7
Sheets (except crib) shipped for export	1,478	1,353	1,381	60.3	51.6	49.0
Pillowcases	14,259	14,578	13,881	217.9	207.7	185.2
Polyester/cotton blends:						
Less than 180 count	7,217	7,520	7,353	94.2	91.5	84.9
180 count and greater	6,654	6,687	6,206	117.0	109.9	95.7
All other fabrics	388	371	322	6.6	6.3	4.5
Finished terry woven towels	51,654	50,245	47,083	756.9	660.9	575.3
By type:						
Sheared	16,558	16,866	15,540	306.5	248.2	238.0
Nonsheared	35,096	33,379	30,982	450.3	412.7	337.4
By end use:						
Kitchen	6,029	5,281	5,142	33.1	26.8	22.9
Bath	24,654	22,815	21,533	471.9	401.5	355.1
Hand, face, guest, and fingertip	18,315	19,012	17,761	186.9	175.5	149.1
Bath/tub mats						
All other types, incl. larger than bath (queen/king size bath towels, bath sheets, and beach towels)	2,656	3,137	2,647	65.0	57.1	48.1

(continued)

Quantity & Value of Shipments by All Producers, 1977-1979
(continued)

	Quantity (Thous. dozens)			Value (Mil.$)		
	1979(p)	1978	1977	1979(p)	1978	1977
For export	1,890	1,072	1,155	$ 38.9	$ 22.1	$ 20.9
Terry woven towels sold for further processing elsewhere (e.g., blanks)	6,846	5,413	nr	87.7	59.6	nr
Huck and crash towels	50,729	63,819	70,186	23.5	27.2	29.0
Terry washcloths	23,444	25,408	24,456	103.4	103.5	92.9
Other terry products:*						
Terry cloth sold by the yard (thous. lin. yds.)	23,733	31,878	24,980	31.5	36.0	34.2
Pot holders, aprons, dishcloths, etc.	6,006	6,739	5,479	24.3	22.6	17.0

* To the extent that terry cloth yard goods is fabricated in the production of towels and washcloths, etc., there is duplication in pertinent figures.
(p) = preliminary
nr = not reported

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels (MQ23X).

Type of Finish

Quantity & Value of Shipments of Sheets, Pillowcases & Towels
Percent Distribution by Type of Finish, 1977, 1978

	Sheets				Pillowcases				Terry Woven Towels			
	Quantity		Value		Quantity		Value		Quantity		Value	
	1978	1977	1978	1977	1978	1977	1978	1977	1978	1977	1978	1977
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Finish:												
White	21.5	19.9	18.7	17.6	18.4	18.5	13.2	13.8	33.1	31.6	22.6	22.2
Solid colors	9.9	8.4	10.8	8.7	9.1	7.5	9.6	7.7	37.3	34.4	44.1	40.4
Fancies	68.6	71.7	70.5	73.7	72.5	74.0	77.2	78.5	29.6	34.0	33.3	37.4

Source: Based on U.S. Bureau of Census
Current Industrial Reports,
Sheets, Pillowcases and Towels
(MQ-23X).

SHIPMENTS

The latest source of information on shipments of home textiles, other than sheets, pillowcases and towels, is the 1977 census of manufactures, reports on which have recently been issued in advance form by the U.S. Bureau of the Census. Findings on available products for 1977, compared with the previous census covering the year 1972 are noted below.

Quantity & Value of Selected Home Textiles Detailed by Type, Shipped by All Manufacturers-1972,1977, (Including Products Made in Weaving Mills)

	Unit of Measure	Quantity (Mil.)		Value (Mil.$)	
		1977	1972	1977	1972
Bedspreads, bedsets, total	units	na	46.1	$400.3	$312.5
Tufted		3.9	15.9	38.5	84.4
Woven		13.2	30.2	142.1	224.7
Jacquard woven		(D)	7.6	(D)	49.9
Other		13.2	22.6	142.1	174.8
Other, type not specified		--	--	6.9	3.4
Quilted		6.2	na	169.8	na
Blankets (bed, camp, etc., incl. electric), total	units	2.1	45.2	111.2	160.8
Woven		0.1	30.0	9.2	68.1
Cotton		(D)	8.4	(D)	13.5
Wool		0.1	2.4	9.2	13.0
Man-made fiber		(D)	19.2	(D)	41.6
Non-woven		2.0	15.2	102.0	48.3
Electric (including all types of bed coverings)		na	4.0	na	44.4
Tablecloths & napkins, mats, total	dozens	na	na	167.4	100.8
Tablecloths, total		1.9	na	103.8	63.6
Plastic, plastic-coated		1.9	na	46.6	28.7
Other		na	na	57.2	34.9
Napkins		na	na	24.5	6.7
Place mats and mat sets, including plastic		na	na	17.8	11.2
Other related articles, except lace (dresser covers, scarves, etc.)		na	na	21.3	19.3
Pillows, total	units	na	51.1	195.0	132.8
Bed pillows, total		na	30.7	108.7	70.7
Foam rubber		na	8.3	23.0	19.9
Other materials		15.8	23.2	85.7	50.8
Fancy pillows & cushions		na	20.4	85.7	61.6
Foam rubber		3.7	6.7	21.5	19.1
Other materials		na	14.1	64.2	42.5
Shower, bath curtains, including plastic-coated fabrics and all other	units	18.5	22.5	62.7	44.5
Comforters and wadded quilts		7.8	7.3	81.6	32.9

Quantity & Value of Selected Home Textiles, Detailed by Type; Shipped by All Manufacturers-1972, 1977, (Including Products made in Weaving Mills) (continued)

	Unit of Measure	Quantity (Mil.)		Value (Mil.$)	
		1977	1972	1977	1972
Quilted products (except comforters & wadded quilts):	units				
Mattress protectors		20.3	12.2	$ 76.6	$ 47.9
Other, including baby pads		na	na	18.7	16.1
Slip covers:	units				
Furniture made from fabric, plastics & other material		11.5	na	55.5	52.1
Mattress & other		27.4	na	25.3	11.7
Bags (laundry, wardrobe, shoe)	units	na	na	21.4	16.7
Other home textiles, not elsewhere classified		na	na	250.6	195.5
Curtains & draperies, not including lace, total	pairs	na	na	956.7	626.2
Window curtains, excluding lace:					
Wholly or chiefly cotton		14.9	29.4	45.6	58.8
Wholly or chiefly mad-made:					
Glass fiber fabrics		1.6	5.2	7.7	12.0
Other man-made fabrics		37.4	29.7	162.8	68.3
Other materials, including plastics		2.0	5.8	17.7	12.4
Draperies:	pairs				
Wholly or chiefly cotton		12.5	19.4	127.3	127.9
Wholly or chiefly man-made:					
Glass fiber fabrics		2.9	8.3	20.1	31.9
Other man-made fabrics		26.0	20.7	265.6	129.5
Other materials, including plastics		2.4	2.9	26.6	11.1
Curtains & draperies, not specified by kind		na	na	263.3	174.3

na = not available

Source: Bureau of the Census,
1977 Census of Manufactures,
Preliminary Reports and Industry Series.

SHIPMENTS

By Geographic Area

The value of specified types of home textiles shipped by all producers by geographic area was reported as follows in the complete 1977 and 1972 censuses of U.S. manufacturers:

Value of Shipments of Specified Home Textiles
(Millions of Dollars)

	1977	1972
Bedspread & bedsets, total	$300.4	$261.2
Middle Atlantic Division		
New York	60.3	54.5
New Jersey	7.4	$5.0 to $9.9
Pennsylvania	6.0	2.0 to 4.9
East North Central Division		
Illinois	4.5	2.0 to 4.9
South Atlantic Division		
North Carolina	65.9	67.2
Georgia	67.9	62.9
Pacific Division		
California	21.4	nr
Sheets & pillowcases, not made in weaving mills, total	479.5	318.5
Middle Atlantic Division		
New York	2.0	5.3
Pacific Division		
California	3.8	nr
Towels & washcloths, not made in weaving mills, total	276.6	112.9
Middle Atlantic Division		
New York	2.8	$10.0 to $19.9

nr = not reported

Source: U.S. Bureau of the Census,
Census of Manufactures,
MC77-1-23E.

DISTRIBUTION

Shipments to institutional users and other non-retail markets represented over 14% of the total value of sheet shipments by U.S. manufacturers in 1978, 9.4% of pillowcase shipments, 31% of terry woven towel shipments, and 22.5% of washcloth shipments. Branded lines of sheets and pillowcases accounted for a larger share of shipments in 1978 than in 1977.

Distribution of Manufacturers' Shipments, 1977, 1978

	Sheets		Pillowcases		Terry Woven Towels		Washcloths	
	1978	1977	1978	1977	1978	1977	1978	1977
Based on Units								
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Distribution								
Branded retail	63.4	62.4	67.4	66.4	46.2	48.2	58.2	58.2
Private ticket retail	20.9	23.2	19.9	22.4	14.5	14.9	12.6	12.0
Institutional & other	15.7	14.4	12.7	11.2	39.3	36.9	28.6	29.8
Based on Dollar Volume								
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Distribution:								
Branded retail	63.7	63.6	69.7	69.1	54.4	54.6	64.0	63.6
Private ticket retail	22.2	23.6	20.9	22.8	14.6	14.8	13.5	13.7
Institutional & other	14.1	12.8	9.4	8.1	31.0	30.6	22.5	22.7

Source: Based on U.S. Bureau of Census Current Industrial Reports, Sheets, Pillowcases and Towels (MQ-23X).

Distribution of home textiles by type of wholesaler has been reported by the U.S. Census Bureau in the 1977 Census of Wholesale Trade.

Distribution of Home Textiles by Type of Wholesaler, 1977

	Number of Establishments	% of Total	Sales (Mils.)	% of Total
Total wholesalers	1,041	100.0%	$3,536.6	100.0%
Merchant wholesalers	731	70.2	1,234.7	34.9
Manufacturers sales branches & offices	194	18.6	2,065.6	58.4
Agents, brokers & commission agents	116	11.1	236.3	6.7

Source: U.S. Department of Commerce, Bureau of the Census, 1977 Census of Wholesale Trade.

PRODUCER PRICE LEVELS

Producer (factory) prices for home textiles, as measured by the U.S. Bureau of Labor Statistics averaged 6.6% higher in 1979 than in 1978. In the first half of 1980, however, prices shot up over 29% compared with the average in the same period of 1979.

Producer Price Indexes For Home Textiles, 1978, 1979, First Half 1980
(Dec. 1977=100 Except Where Otherwise Noted)

	Annual Avg.		Average		% Increase	
			Jan.-June	Jan.-June		Jan.-June
	1979	1978	1980	1979	1979/1978	1980/1979
Textile housefurnishings*	190.4	178.6	201.1	155.4	6.6%	29.4%
Bedspreads & bedsets*	192.8	182.0	208.1	187.6	5.9	10.9
Flat sheets, except crib	106.1	102.3	110.6	104.1	3.7	6.2
Fitted sheets, except crib	105.9	101.0	113.9	103.7	4.9	9.8
Pillowcases	106.8	102.0	113.2***	104.2***	4.7	8.6
Towels	131.4	122.1	141.0	128.0	7.6	10.2
Shower & bath curtains**	157.6	137.1	178.5	150.8	14.9	18.4
Window & furniture accessories	111.9	102.9	114.7	110.9	8.7	3.4
Draperies**	151.2	137.4	153.8	149.6	10.0	2.8

*Dec. 1967=100
**Dec. 1968=100
***Covers January-April period.

Source: U.S. Department of Labor,
Bureau of Labor Statistics,
Producer Price & Price Indexes.

FOREIGN TRADE

According to the U.S. Census Bureau, exports represented 9.6% of U.S. manufacturers' shipments (dollar value) of sheets and pillowcases in 1979, up from 7.0% in 1978. In towels, exports represented 6.3% in 1979, up from 5.2% in 1978.

Of total domestic supply, (manufacturers' shipments less exports plus imports) imports represented 0.5% of the total value of sheets and pillowcases and 8.2% of the towel market in 1979.

Shipments, Exports & Imports, 1978, 1979
(Quantity in 1,000 dozens; value & calculated import duty in $1,000)

	Sheets & Pillowcases		Terry Woven Towels	
	1979	1978	1979	1978
Sheets & pillowcases				
Manufacturers' shipments				
Quantity	29,461	32,087	50,255	50,235
Value f.o.b. plant	$939,324	$946,399	$746,008	$660,870
Exports of domestic merchandise				
Quantity	2,431	1,678	1,638	1,177
Value	$ 89,983	$ 65,264	$ 46,940	$ 34,271
% exports to mfrs. shipments:				
Quantity	8.2	5.3	3.2	2.3
Value	9.6	7.0	6.3	5.2
Imports for consumption				
Quantity	131	152	8,091	5,503
Value*	$ 4,354	$ 3,558	$ 62,812	$ 45,675
Calculated import duty	$ 596	$ 520	$ 7,173	$ 5,506
Apparent consumption				
Quantity	27,161	30,228	56,708	54,561
Value	$853,695	$873,287	$761,790	$672,274
% imports to apparent consumption				
Quantity	0.5	0.5	14.3	10.1
Value	0.5	0.4	8.2	6.8

*Imports equal cost, insurance and freight (c.i.f.) value plus calculated import duty.

Source: U.S. Bureau of the Census.

Imports

Following a sharp rise in the years 1977 and 1978, imports of wool blankets dropped 19% in terms of units in 1979 compared with the previous year, and were down 5.1% in value. However, imports of other types of blankets continued to gain. West Germany was the leading supplier. Developments in imports of other types of home textiles in 1979 compared with 1978 are outlined in the following table.

FOREIGN TRADE

Imports

Imports of Specified Home Textiles by Leading Country of Origin-1979, 1978

	Unit of Measure	Quantity (Thous.) 1979	Quantity (Thous.) 1978	% Change 1979/1978	Value(C.I.F.)* (Thous.) 1979	Value(C.I.F.)* (Thous.) 1978	% Change 1979/1978
Curtains & draperies, (veg. fiber), total	No.	43.0	48.2	- 10.8%	$ 305	$ 247	+ 23.5%
Blankets, wool, total	Lbs.	415.8	513.5	- 19.0	2,771	2,920	- 5.1
United Kingdom		192.6	235.5	- 18.2	1,409	1,544	- 8.7
Peru		92.7	119.4	- 22.4	410	508	- 19.3
Blankets, other, total	No.	891.0	770.3	+ 15.7	8,851	8,128	+ 8.9
West Germany		596.0	554.5	+ 7.5	6,393	6,661	- 4.0
Spain		107.0	47.9	+123.4	1,327	632	+110.0
United Kingdom		77.4	44.3	+ 74.7	451	288	+ 56.6
China (Mainland)		40.5	43.3	- 6.5	110	95	+ 15.8
Sheets & pillowcases, (veg. fiber), total	No.	1,446.3	1,770.8	- 18.3	3,877	3,101	+ 25.0
India		452.1	527.8	- 14.3	342	341	+ 0.3
China (Mainland)		438.2	563.4	- 22.2	1,001	1,081	- 7.4
Pakistan		165.8	--	--	86	--	--
United Kingdom		163.8	87.2	+ 87.8	1,030	509	+102.4
Bedding, n.e.s., total	Lbs.	3,913.4	5,279.2	- 25.9	15,305	17,449	- 12.3
India		1,530.4	2,104.9	- 27.3	4,228	4,714	- 10.3
Mexico		595.1	379.4	+ 56.8	1,849	1,302	+ 42.0
Singapore		261.5	126.4	+106.9	1,077	698	+ 54.3
Korean Republic		232.4	883.7	- 73.7	891	3,491	- 74.5
Towels, cotton shop, total	No.	92,089.8	98,334.0	- 6.3	8,432	8,137	+ 3.6
Hong Kong		53,935.8	66,402.5	- 18.8	5,152	5,589	- 7.8
China (Mainland)		17,297.5	8,750.0	+ 97.7	1,161	505	+129.9
Towels, (veg. fiber), total	No.	117,747.9	92,085.0	+ 27.9	59,394	51,224	+ 15.9
Pakistan		48,424.2	28,747.5	+ 68.4	12,983	6,898	+ 88.2
India		30,722.7	24,864.3	+ 23.6	10,669	7,187	+ 48.4
Hong Kong		14,099.4	15,730.1	- 10.4	7,632	9,783	- 22.0
Brazil		4,010.3	5,054.6	- 20.7	8,983	10,635	- 15.5
Tablecloths & napkins, total	Lbs.	4,999.3	3,801.9	+ 31.5	12,340	8,688	+ 42.0
Pakistan		1,164.5	688.8	+ 69.1	2,173	915	+137.5
Hong Kong		1,242.0	881.2	+ 40.9	2,867	1,647	+ 74.1
India		701.7	246.3	+184.9	1,560	455	+242.9
Korean Republic		537.6	579.7	- 7.3	1,162	782	+ 48.6

*C.I.F. Import Value--the value of imports at the first port of entry in the United States based on the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation.

n.e.s. = not elsewhere specified

Source: U.S. Bureau of the Census,
U.S. Central Imports, Report FT135.

AT THE RETAIL LEVEL

CONSUMER EXPENDITURES

An analysis of National Income & Product Accounts by the Bureau of Economic Analysis, U.S. Department of Commerce, which drew on findings in the 1972 Census of Retail Trade, has yielded data on personal consumption expenditures for home textile products. In the following table, projections have been compiled based on figures reported by the Bureau for broader classifications of personal spending in 1979.

The figures reflect retail sales, and do not include the contract or institutional market. The value of the market at retail is currently estimated at about $11 billion.

Personal Consumption Expenditures For Home Textiles
(In Millions of Dollars)

	1972	Projected 1979
Home textiles, total	$4,770	$11,002
Blankets	131	355
Electric blankets, bed coverings	82	191
Bedspreads, bedsets	536	1,251
Comforters, quilts	37	86
Sheets, pillowcases	762	1,776
Mattress protectors, pads, etc.	113	263
Pillows	230	536
Towels, washcloths	619	1,443
Shower curtains	77	180
Tablecloths, napkins, related mdse.	293	683
Slip covers	111	258
Curtains, draperies	971	2,263
Window shades, blinds, etc.	208	485
Mops, dusters	71	165
Bags (laundry, wardrobe, shoe)	29	67
Other household textiles	500	1,000

CONSUMER PRICES

Prices at retail for textile house furnishings, as measured by the Bureau of Labor Statistics, averaged 6.7% higher in 1979 than in 1978, but in the first six months of 1980 rose at an average close to 8%.

Consumer Price Indexes for Home Textiles, 1978, 1979, First Half 1980
(Dec. 1977=100 Except Where Otherwise Noted)

	Annual Average		Jan.-June Avg.		% Increase	
	1979	1978	1980	1979	1979/78	Jan.-June 1980/79
Textile house furnishings*	173.9	162.9	185.2	171.6	6.7%	7.9%
Household linens	105.7	100.2	112.4	104.8	5.5	7.3
Curtains, draperies, slipcovers, sewing materials	103.8	103.0	118.7	109.2	0.8	8.7

*Dec. 1967=100

Source: U.S. Bureau of Labor Statistics.

SALES BY TYPE OF RETAIL OUTLET

Detailed information on retail sales, analyzed by merchandise categories, is compiled every five years by the U.S. Bureau of the Census in the Census of Retail Trade.

The most recent census, covering operations in 1977, showed that under the classification of home textiles, the sales volume distribution for Window & Furniture Covering outlets was 58.5% for department and variety stores, and 86.1% for department, variety, furniture, and drapery, curtain & upholstery stores.

Department and variety stores accounted for 84.8% of Domestics & Closet Accessories outlet sales, while department, variety, furniture, and drapery, curtain & upholstery stores amounted to 86.6%.

Reported Sales of Home Textiles & Related Merchandise by Store Type, 1977
(Stores with Payrolls Only)

	Curtains Draperies & Dry Goods, Total#		Window Furniture Coverings##		Domestics & Closet Accessories###	
	Number of Stores*	Sales (Mil.$)	Number of Stores*	Sales (Mil.$)	Number of Stores*	Sales (Mil.$)
Total	81,734	10,010.8	na	na	na	na
Department Stores**	8,807	4,725.8	7,950	1,396.9	8,523	2,515.9
Variety stores	13,262	730.2	10,713	127.3	12,573	226.6
Furniture stores	6,786	241.4	6,187	209.2	954	27.5
Floor covering stores	2,129	79.8	2,109	76.6	80	2.1
Drapery, curtain & Upholstery stores	4,427	560.6	4,427	512.4	627	31.9
Other home furnishings stores	1,753	242.5	738	44.3	1,567	191.8
Sewing, needle & piece goods stores	10,064	1,755.0	1,181	63.1	264	10.9
Other	30,751	1,231.0	na	na	na	na
Mail order	3,755	444.6	3,630	177.2	3,618	229.0

na = not available

*Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within the stores are included in the department store data; but not sales of catalog headquarter operations, which are included in mail order houses.

#Includes curtains, draperies, bedsheets, blankets, linens, piece goods, patterns, laces, trimmings, notions, closet accessories, blinds, and window shades. The following are subdivisions of this department.

##Window and furniture coverings (ready-made, custom-made and piece goods).

###Includes bed and table coverings, towels and closet accessories.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

Department Stores

According to the National Retail Merchants Association, the typical department store with sales over $1 million reported an increase in 1979 of 5.5% over the previous year. NRMA reports nine departmental breakouts in home textiles. Of these, two categories--linens & domestics and table linens & other table coverings--registered the greatest median increase in sales (10.9%), while readymade curtains, shades, blinds & hardware, the least (1.7%). On the average, linens & domestics also contributed the highest percent of store sales (3.3%).

Typical markons ranged from 45.0% to 50.3%. Markdowns averaged between 5.8% and 10.5%.

Stock turns, registering 3.1 for total upstairs stores, recorded between 1.4 and 2.8 for all categories of home textiles.

SALES BY TYPE OF RETAIL OUTLET

Department Stores

Selected Typical (Median) 1979 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Total Upstairs Store	Mattress Pads & Covers	Window & Furniture Coverings
Net sales, % change from last year	5.5	3.7	2.3
Sales, % of total store sales	89.2	0.4	1.0
Sales, % of merchandising division	--	6.0	19.5
Gross margin, % of sales including cash discounts	42.2	45.0	43.6
Cumulative markon, %	48.0	48.5	48.3
Markdown, retail, % of sales	13.2	7.3	9.2
Stock turns	3.1	1.9	1.7
Returns, % of gross sales	8.0	4.5	13.5
$ Sales per sq. ft. of selling space	91.6	66.3	48.5
Sales promotion, % of sales	3.0	3.2	3.7
Salespeople's salaries, % of sales	7.7	9.4	10.5

	Ready Made Draperies & Slip Covers	Ready Made Curtains, Shades, Blinds, Hdware.
Net sales, % change from last year	2.9	1.7
Sales, % of total store sales	0.8	0.7
Sales, % of merchandising division	13.5	9.4
Gross margin, % of sales including cash discounts	44.7	40.7
Cumulative markon, %	50.3	48.1
Markdown, retail, % of sales	10.5	6.2
Stock turns	1.6	1.4
Returns, % of gross sales	--	--
$ Sales per sq. ft. of selling space	48.0	50.7
Sales promotion, % of sales	4.3	4.3
Salespeople's salaries, % of sales	--	--

	Linens & Domestics	Towels	Sheets & Pillowcases
Net sales, % change from last year	10.9	10.3	7.6
Sales, % of total store sales	3.3	0.9	0.6
Sales, % of merchandising division	61.9	16.2	11.8
Gross margin, % of sales including cash discounts	43.0	45.9	44.7
Cumulative markon, %	46.5	47.9	47.8
Markdown, retail, % of sales	7.0	5.8	6.5
Stock turns	2.4	2.7	2.5
Returns, % of gross sales	7.1	4.9	5.4
$ Sales per sq. ft. of selling space	94.6	119.3	109.4
Sales promotion, % of sales	3.7	3.4	4.2
Salespeople's salaries, % of sales	7.6	7.4	7.4

(continued)

Department Stores (continued)

Selected Typical (Median) 1979 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Blankets, Comforters & Bed Pillows	Table Linens & Other Table Coverings
Net sales, % change from last year	13.3	10.9
Sales, % of total store sales	0.8	0.8
Sales, % of merchandising division	15.6	18.1
Gross margin, % of sales including cash discounts	43.8	42.6
Cumulative markon, %	46.9	45.0
Markdown, retail, % of sales	6.8	7.4
Stock turns	2.8	2.5
Returns, % of gross sales	10.6	9.2
$ Sales per sq. ft. of selling space	118.8	83.3
Sales promotion, % of sales	4.7	3.5
Salespeople's salaries, % of sales	7.4	7.5

Source: National Retail Merchants Association, "Merchandising & Operating Results," 1980 Edition.

According to data compiled by Discount Merchandiser, nearly one-third of all linens, domestics and fabric purchases were made in discount stores during 1978 and 1979, while approximately 20% were from department stores.

Percent of Linens, Domestics & Fabric Purchases by Type of Outlet—1978 & 1979

	1979	1978
Discount stores	31.9%	30.8%
Department stores	20.5	20.3
Misc. general merchandise stores	12.9	12.4
Variety stores	10.7	10.8
Drapery, fabric stores	9.8	9.7
Family apparel stores	5.9	7.3
Mail order	5.2	5.7
Furniture stores	3.1	3.0

Source: Discount Merchandiser, May 1978 and 1979 editions.

Curtain, Drapery & Upholstery Stores

According to the 1977 census of retail trade, there were a total of 11,416 stores (individual business locations) classified as curtain, drapery and upholstery stores operating in 1977, with total sales of $772,199,000. In the 1972 census, findings were reported only for curtain, drapery stores with payrolls. Comparisons in this respect with 1977 findings are noted below.

RETAIL SALES BY TYPE OF OUTLET

Curtain, Drapery & Upholstery Stores

Curtain, Drapery & Upholstery Stores, 1972, 1977

All Stores, 1977		Stores With Payroll				
		Number		Sales (mil.$)		
Number	Sales (mil.$)	1977	1972	1977	1972	% Increase
11,416	$772.2	4,427	4,140	$648.4	$478.9	35.4

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade (RC77-S-1).

Of the total count in 1977 covering curtain, drapery and upholstery stores, 10,061 stores were in operation the entire year. While most of the outlets were small, with volume under $100,000, the 20.4% of the stores with volume of $100,000 or more controlled almost 75% of total sales in this specialty store classification.

Distribution of Curtain, Drapery Upholstery Stores
By Sales Volume Group, 1977

	Stores		Sales	
	No.	%	Mil.$	%
Total stores in operation entire year	10,016	100.0%	$717.2	100.0%
Annual sales--				
$1.0 mil. & over	24	0.2	37.6	5.2
$100,000-$999,999	2,030	20.2	494.6	69.0
Under $100,000	8,007	79.6	185.0	25.8

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade (RC77-S-1).

CONSUMER SALES TRENDS BY PRODUCT

NPD Research Inc. is the source for a specialized NPD Textile and Apparel Market Index, which is compiled on the basis of an on-going monthly diary tracking the purchases of 6,500 nationally representative families.

Detailed information based on NPD Research is covered in Home Fashions Textiles, a monthly trade magazine published by Fairchild Publications. Consumer sales trends for the latest available 12 month period, in terms of units and dollars, based on NPD panel reports, are noted below, followed by information reported on specific types of home textiles.

CONSUMER SALES TRENDS BY PRODUCT

Consumer Sales Trends For Home Textiles
Percent Change, 12 Months Ending March—1980/1979

Category	Units	Dollars	Average Price
Sheets	+ 3.6%	+14.9%	+11%
Bath towels	+ 2.5	+17.4	+14
Other bathroom towels	+22.4	+25.1	+ 2
Blankets	+17.3	+38.6	+18
Bedspreads	- 4.5	+ 6.1	+11
Comforters	+ 4.3	+ 9.9	+ 5
Pillows	-14.3	- 4.0	+12

Source: Home Fashions Textiles based on NPD Research (July/Aug. 1980).

Sheets

Based on information reported in purchase diaries maintained by the 6,500 representative households throughout the country who are members of the NPD Consumer Panel, the percent of unit purchases of sheets priced under $4.00 dropped from 48.9% in 1978 to 41.4% in 1979, reflecting price increases at the retail level, and trading up.

Along with this development, consumers reported a greater percentage of purchases in department stores, somewhat less in discount stores, chain and mail order houses.

Sheet Purchase Distribution by Price Point, 1978, 1979
(Based on Units)

	1978	1979
Total reported purchases	100.0%	100.0%
Price points:		
Less than $1.99	7.7	5.5
$2.00 - $2.99	19.6	15.7
$3.00 - $3.99	21.6	20.2
$4.00 - $4.99	23.5	19.8
$5.00 - $5.99	8.6	12.8
$6.00 - $6.99	5.5	7.6
$7.00 - $7.99	3.8	5.4
$8.00 & over	9.7	13.0

CONSUMER SALES TRENDS BY PRODUCT

Sheet Purchase Distribution by Store Type, 1978, 1979
(Based on Units)

	1978	1979
Total reported purchase	100.0%	100.0%
Department store	26.0	28.5
Discount store	34.3	33.6
Specialty	0.8	0.1
Chain & mail order	30.5	27.2
Other	8.4	10.6

Source: Home Fashions Textiles based on NPD Research (Nov. 1979).

Blankets

NPD Research data on blanket purchases in the 12-month period ending in September 1979 compared with the same 1978 period showed the stimulus of lowered thermostats. This was the best-performing home textile category in that period. Unit purchases of blankets were up 8%, while dollar expenditures rose 15%.

Electric blankets represented 15.6% of reported blanket purchases in the 12-month period ending September 1979, down from 20.4% in the comparable period a year earlier, based on unit purchases.

Blanket Purchase Distribution by Price Point, 1978, 1979
(Based on Units)

	(12 Months Ending September)	
	1979	1978
Total reported purchases	100.0%	100.0%
Price points:		
$8.00 & under	54.9	54.3
$8.01 - $12.00	21.7	20.0
$12.01 - $16.00	4.8	11.8
$16.01 - $21.00	9.0	5.5
$21.01 - $26.00	5.8	5.7
$26.01 & over	3.8	2.7

Blanket Purchase Distribution by Store Type, 1978, 1979
(Based on Units)

	(12 Months Ending September)	
	1979	1978
Total reported purchases	100.0%	100.0%
Department stores	18.5	24.2
Major chains & mail order	34.3	35.4
Discount stores	35.3	29.1
Specialty stores	--	0.3
Other stores	11.9	11.0

Source: Home Fashions Textiles, based on NPD Research (Feb. 1980).

CONSUMER SALES TRENDS BY PRODUCT

Comforters

According to NPD Research, dollar volume in comforters rose 4% and unit volume 2% in 1979 compared with 1978. November, December and March were the peak months for purchases, according to the NPD's Panel, accounting for 12.7%, 11.9% and 10.4% in respective unit purchases.

The majority of reported comforter purchases occurred at the lower end of the pricing scale. In 1979, 24.6% were at less than $14.00; for 1978, that figure was 26.7%. High-end sales--imported comforters of natural fiber fill and quality craftmanship--recorded share of market at retail of 3.8% in 1979 and 3.5% in 1978. The greatest drop in sales between 1978 and 1979 was the $22.00-$25.99 range where 11.6 points were lost; the greatest increase was in the $26.00-$29.00 range.

Department stores accounted for the bulk of reported purchases (31.6%), followed by chain and mail order houses (27.1%).

Comforter Purchase Distribution by Price Point, 1978, 1979
(Based on Units)

	1979	1978
Total reported purchases	100.0%	100.0%
Price points:		
Under $14.00	24.6	26.7
$14.00 - $17.99	14.0	14.9
$18.00 - $21.99	18.3	11.8
$22.00 - $25.99	9.1	20.7
$26.00 - $29.99	13.8	7.3
$30.00 - $37.99	8.3	7.8
$38.00 - $47.99	5.8	5.5
$48.00 - $55.99	2.4	1.8
$56.00 & over	3.8	3.8

Comforter Purchase Distribution by Store Type, 1978, 1979
(Based on Units)

	1979
Total reported purchases	100.0%
Department store	31.6
Discount store	23.3
Variety	3.4
Chain & mail order	27.1
Other	14.6

Source: Home Fashions Textiles based on NPD Research (Sept. 1980).

Curtains

A nationwide survey among 45 leading department and discount stores on their curtain and drapery operations developed information on sales by price point in 1979. In discount stores, about 79% of the curtain business was at prices under $10 compared with 47% of department store sales of curtains at this price level.

The stores reported that styling was the most important consideration for their customers in buying curtains, followed by price.

Curtain Sales Distribution by Price Point, 1979

	Discount Stores	Department Stores
Total sales	100.0%	100.0%
Price points:		
Under $5.00	39.4	5.3
$5.00 - $9.99	39.5	20.1
$10.00 - $14.99	12.3	22.0
$15.00 - $19.99	4.9	16.1
$20.00 - $24.99	1.9	16.9
$25.00 - $29.99	1.6	10.1
$30.00 - $39.99	0.3	5.8
$40.00 & over	0.1	3.7

Ranking of Consumer Priorities in Curtain Purchases
(In Department Stores & In Discount Stores)

	Department Stores	Discount Stores
Styling	1	1
Price	2	2
Texture of fabric	3	4
Durability of fabric	4	3
Fiber content of fabric	5	5
Ease of installation	6	7
Energy-saving characteristics	7	6
Brand name	8	9
Flammability	9	8

Source: Home Fashions Textiles, (March 1980).

CONSUMER SALES TRENDS BY PRODUCT

Draperies

Approximately 20.0% of all department store drapery dollar sales are within the $20.00-$24.99 price range, while 55.5% of all discount store sales are under $15.00. In drapery fabrication, open weave, malimo styles in 1979 represented 34.6% of department store sales and 27.6% of discount. In closed weave, antique satin accounted for 70.0% of sales in department stores in 1979 and 41.2% for discounters, according to the survey among 45 stores by Home Fashions Textiles.

Draperies Sales Distribution by Price Point, 1979

	Discount Stores	Department Stores
Total sales	100.0%	100.0%
Price points:		
Under $15.00	55.5	13.3
$15.00 - $19.99	24.5	13.3
$20.00 - $24.99	9.2	19.7
$25.00 - $29.99	5.0	10.8
$30.00 - $39.99	3.9	15.4
$40.00 - $49.99	1.3	9.6
$50.00 - $69.99	0.6	10.0
$70.00 & over	--	7.9

Ranking of Consumer Priorities in Drapery Purchases
(In Department Stores & In Discount Stores)

	Department Stores	Discount Stores
Styling	1	2
Texture of fabric	2	5
Energy-saving characteristics	3	1
Price	4	4
Durability of fabric	5	3
Ease of installation	6	6
Fiber content of fabric	7	7
Brand name	8	9
Flammability	9	8

Source: Home Fashions Textiles,
(March 1980).

Draperies (continued)

Retail Sales of Ready-Made Draperies by Type - 1979

	% of Units Sold
Total sales	100.0%
Closed weave	52.9
Unlined	13.1
Fabric-backed	4.1
Foam-backed	35.7
Open weave	31.2
Unlined	11.1
Self-lined	8.8
Fabric-backed	11.3
Shears	15.9
Pinch pleat	4.7
Rod pocket	11.2

Source: Home Fashions Textiles, (March 1980).

Table Linens

According to a survey among department and discount stores by Home Fashions Textiles, the tablecloth business lost ground to placemats and other tabletop categories in 1979. Department stores estimated tablecloth sales dropped from 55% in 1978 to 49% of table linen sales in 1979, while placemat sales increased from 21% to 24%. Napkins represented 17.1% of reported sales.

In discount stores, tablecloth sales were down from two-thirds of total sales in 1978 to 56.8% in 1979. Placemat sales held steady at just over 26%; napkins were up to 12%.

The best-selling tablecloth by size in discount stores is 52" x 70", according to 61.3% of respondents, followed in mentions by the 72" round, (17.3%). The 60" x 90" size is the best-seller in department stores, according to 38.4%, followed in mentions by the 52" x 70" size (26.3%). (Home Fashions Textiles, July/August 1980).

Kitchen Towels

The survey conducted by Home Fashions Textiles among department stores and discount stores showed the best-selling price line for kitchen towel sales was $2.51 to $3.00, accounting for close to 42% of unit volume. In discount stores, sales were concentrated in the $1.50 to $2.00 bracket (65% of unit sales).

(continued)

CONSUMER SALES TRENDS BY PRODUCT

Kitchen Towels (continued)

Kitchen Towel Sales Distribution by Price Point, 1979

	Department Stores	Discount Stores
Total sales	100.0%	100.0%
Price points:		
Less than $1.50	8.4	11.7
$1.50 - $2.00	8.3	64.7
$2.01 - $2.50	29.2	17.6
$2.51 - $3.00	41.7	5.9
More than $3.00	12.5	5.9

Source: Home Fashions Textiles, (June 1980).

CONSUMER BUYING HABITS

In October 1979 House & Garden had a survey conducted among their subscribers by Scarborough Research Corp. to develop information on home furnishings buying. The report reflected answers from 4,477 subscribers in total, not all of whom received the same questionnaire.

The percent of House & Garden subscribers who had purchased home textiles in the past 12 months, in total and by age group, was reported as follows, together with estimates on the percent of all U.S. households who purchased, according to Scarborough Research Corp.

Purchasers & Home Textiles

	All U.S. Hsholds.	H & G Total	Age Groups			
			20-29	30-39	40-49	50 & over
Total respondents		100%	100%	100%	100%	100%
Purchasers of -						
Linens		81	78	83	83	79
Bath, bed	40	72	70	75	77	69
Table linens		39	41	41	38	37
Blankets	19	30	28	29	36	29
Curtains, draperies	18	47	53	48	46	44

Place of purchase of linens, curtains and draperies, reported by House & Garden Subscribers was as follows:

	Linens	Curtains, Draperies
Total respondents who purchased each type	100%	100%
Store type:		
Department stores	86	62
Discount stores	14	6
Furniture stores	3	8
Other store types	8	29

Note: Columns add to more than 100% due to multiple responses.

CONSUMER BUYING HABITS

In February 1979 Seventeen Magazine reported on a survey based on 1,009 responses from their consumer panel of teenage girls (ages 13 - 19 years). From the 82.7% who have their own room at home, the following data on home textile furnishings was developed.

	Bedspreads	Curtains	Draperies
Furnishings in room (Base: Girls having room at home)	94.1%	81.2%	18.9%
When furnishings were acquired: (Base: Girls having item in room)			
Past month	6.3%	3.3%	5.7%
6 months - 1 year	23.5	18.8	9.1
1 - 2 years	29.9	23.5	23.9
2 or more years	35.6	44.8	47.2
How furnishings were acquired (Base: Girls having item in room)			
Personally bought	34.1%	33.7%	30.7%
Gift	42.7	34.5	35.2
Passed down from other family member	9.8	12.2	13.6
Furnishings expect to acquire for room (Base: Girls expecting to decorate room)	55.5%	41.5%	11.8%
Selector of furnishings for room (Base: Girls expecting to purchase item)			
Girl, herself	55.2%	46.1%	43.1%
Mother	7.1	9.4	7.8
Both	31.5	38.9	39.2
Other	4.1	1.7	7.8

Source: Seventeen Magazine,
"Home Furnishings Survey,"
(February 1979).

FAIRCHILD FACT FILES AVAILABLE FOR 1980

CONSUMER MARKET DEVELOPMENTS: Summarizes key economic trends and indicators, particularly those having a direct relationship to the consumer market for durable and nondurable goods. A wide variety of sources are drawn on to present an overview of economic developments and market trends, as well as consumer market dynamics, including trends by age group, educational and income levels, buying patterns and outlook.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (December): Covers the latest available annual sales of department stores throughout the country listed by buying headquarter location. Includes data on number of outlets covered in reported sales totals, as well as information on sales for many branch and main stores. Some leading specialty operations are also included in the listing by location. Other listings: department store operations with sales of $50 million or more reported in order of volume, major conglomerates with general merchandise store or apparel store divisions, and department stores operated by major department store corporations.

FASHION ACCESSORIES: Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME ELECTRONICS: A statistical summary of the consumer electronics market. Product classifications include home entertainment and related products (television sets, radios, stereos, audio and video systems, video games, etc.), as well as home security and fire protection devices and calculators. Data presented at the manufacturer, retailer, and consumer levels.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS', AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on operating ratios in department and specialty stores, seasonal patterns in advertising, more. Information is also presented on consumer spending and buying preferences.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S CLOTHING, TAILORED SPORTSWEAR AND RAINWEAR: Manufacturer level profiled by production, value of shipments, employment, size of firms, more. Imports from key foreign sources by unit and dollar value covered, and data is also presented on retail sales and merchandising.

MEN'S FURNISHINGS AND CAREER/WORK WEAR: Includes information on number of manufacturers, production and shipment figures, geographical distribution, size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, and advertising patterns.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S, WOMEN'S, AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

MEN'S, WOMEN'S AND CHILDREN'S FOOTWEAR: Findings in a 1980 survey on consumer purchases of footwear are an important new feature of this FACT FILE. Also included are data on major trends in the industry in relation to imports, domestic production and shipments, as well as developments at the retail level.

SOFT SURFACE FLOOR COVERINGS (November): Trends in the number of manufacturers, in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE-APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics, as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills. Also: exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditure data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type, and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES (January 1981): Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR AND DAYWEAR: Data on production and shipments, tracing market shifts in response to fashion changes. Also: imports, retail trends and merchandising ratios, and data on consumer buying habits.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing such as the designer label.

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Department Store Sales

FACT FILE

Market Research Division
Fairchild Publications, New York

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Department Store Sales

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E. B. Gold, Manager
Fairchild Book Division

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INTRODUCTION

This report summarizes sales and number of stores operated in the year 1979 for traditional department store organizations (as well as a limited number of specialty stores), listed by buying headquarter location as well as branch store locations where sales data are available.

Because many large department store organizations are now operating stores that are geographically dispersed, beyond the immediate trading areas in which they were formerly confined, a change has been made in the listing of stores compared with earlier editions of the DEPARTMENT STORE SALES FACT FILE. In this edition, stores are listed by state and city within the four major geographic regions: Northeast, North Central, South and West. Listings of stores, store groups or divisions with a volume of $50 million or more and of chain and conglomerate organizations are also included in this report.

The sales figures are reported by the stores or are estimates believed to be reasonably accurate. Sources include the editorial staffs of Women's Wear Daily and other Fairchild trade papers, Dun and Bradstreet and other trade sources.

The Standard Industrial Classification (SIC) Manual defines department stores as establishments normally employing 25 people or more, having sales of apparel and soft goods combined amounting to 20 percent or more of total sales, and selling each of the following lines of merchandise:

1. Furniture, home furnishings, appliances, radio and TV sets
2. A general line of apparel for the family
3. Household linens and dry goods

To qualify as a department store, sales of each of the above listed lines must be less than 80 percent of total sales. An establishment with total sales of $10 million or more is classified as a department store even if sales of one of the merchandise lines listed above exceeds the maximum percent of total sales, provided that the combined sales of the other two groups are $1 million or more. Relatively few stores are included in this classification as a result of this special rule and most of those which are would otherwise have been classified in the apparel group.

To an increasing extent, however, department stores are diversifying their activities, or becoming part of conglomerate operations active in a number of different types of businesses: This has, of course, added to the difficulty of isolating department store volume from consolidated sales data.

NOTE: This report includes only those stores for which sales data, believed to be reasonably accurate, are available. The sales estimates reported may differ markedly from estimates reported for previous years. This may be due, however, not to an actual gain or loss in volume of the magnitude indicated but to differences in the compilation of estimates. Since revisions in earlier estimates may be in order, year-to-year comparisons in sales figures are not recommended.

Fairchild Market Research Division
Audrey S. Balchen, Director

SUMMARY OF AVAILABLE SALES FIGURES FOR LEADING DEPARTMENT STORES, 1979*

	Approx. Sales (Millions of $)
NORTHEAST	
CONNECTICUT	
Bridgeport	
D. M. Read Inc. (Allied Stores, New York, N.Y.) (5 stores in Conn.)	$ 71.5
Skydel's Inc. (1 store)	4.0
Hartford	
G. Fox & Co. (May Dept. Stores, St. Louis, Mo.) (8 stores: Conn. 7, R.I. 1)	145.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (1 store)	10.0
Sage-Allen & Co. (13 stores in Conn.)	49.8
New Britain	
D & L Stores (8 stores in Conn.) (Also operates 39 Weathervane Shops in Northeast & South)	16.0
Stamford	
Bloomingdale's (Bloomingdale's, New York, N.Y.) (1 store)	29.0
MAINE	
Brunswick	
W. F. Senter (1 store)	3.0
Freeport	
L. L. Bean (1 store plus mail order business)	94.0
Portland	
Porteous Mitchell & Braun (4 stores: Maine 3, N.H. 1)	18.0
MASSACHUSETTS	
Boston Area	
Bloomingdale's (Bloomingdale's, New York, N.Y.) (2 stores)	20.0
Bonwit Teller (Bonwit Teller, New York, N.Y.) (1 store)	10.0
Filene's (Federated Dept. Stores, Cincinnati, Ohio) (12 stores: Mass. 10, N.H. 1, R.I. 1. Also operates Basement Stores in Framingham, Sargus & Worcester, Mass.)	267.7
(The Chestnut Hill & Braintree, Mass. stores under expansion in 1980. A store in Attleboro, Mass. was opened in 1980.)	
Harvard Coop, Cambridge (1 store)	37.0+
Jordan Marsh (Allied Stores, New York, N.Y.) (14 stores: Mass. 12, N.H. 1, R.I. 1)	374.0
Kennedy's (Phillips-Van Heusen, New York, N.Y.) (11 stores in Mass. & R.I.)	13.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 stores)	22.0

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*A limited number of specialty apparel stores are also included. Sales figures are for the year 1979, reflecting published figures or best available estimates on annual volume.

DEPARTMENT STORE SALES

NORTHEAST

MASSACHUSETTS	Approx. Sales (Millions of $)
Boston Area (continued)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (1 store)	$ 18.0
The Talbot's, Hingham, Mass. (15 stores plus catalog operation)	50 to 75
Pittsfield	
England Bros. (3 stores in Mass.)	9.0
Plymouth	
Buttner's Inc. (7 stores in Mass.)	3.0
Quincy	
Bargain Center (2 stores in Mass.)	10.0
Springfield	
Albert Steiger (9 stores: Mass. 8, Conn. 1)	46.0
Waltham	
Grover Cronin Inc. (1 store)	10.0
NEW JERSEY (Also see New York City Area)	
Newark	
Bamberger's (R. H. Macy & Co., New York, N.Y.) (22 stores: N.J. 16, Dela. 1, Pa. 5) (Princeton, N.J. store was closed in Spring 1980.)	600.0+
Hahne & Co. (Associated Dry Goods, New York, N.Y.) (7 N.J. stores) (Store at Woodbridge, N.J. was opened in 1979. A Rockaway, N.J. store was opened in February 1980.)	48.0
Paterson	
Meyer Brothers (2 stores in N.J.)	3.0
Trenton	
S. P. Dunham & Co. (United Dept. Stores, Trenton, N.J.) (4 stores in N.J.) (Also operates Sattler's Inc. in Buffalo, N.Y.)	21.0
NEW YORK	
Albany (Menands)	
Denby's (The Outlet Co., Department Store Div., Providence, R.I.) (14 stores: N.Y. 12, Mass. 2) (Sold to United Dept. Stores, Trenton in 1980)	25.0

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
NEW YORK	
Albany (Menands) (continued)	
(Filene's, Boston and J.C. Penney are planning to open stores in the Crossgates Shopping Mall which opened in the Fall of 1980.)	
Binghamton	
Fowler, Dick & Walker, Inc. (L. S. Good, Wheeling, W. Va.) (2 stores in N.Y.)	$ 15.0
(Also has a separate division store in Wilkes-Barre, Pa., which was sold to Boscov's in August 1980.)	
Buffalo Area	
Adam, Meldrum & Anderson (9 stores in N.Y.)	75.0
William Hengerer (Associated Dry Goods, New York, N.Y.) (5 N.Y. stores)	30.0
Hens & Kelly (8 N.Y. stores)	32.0
Jenss Dept. Stores, Amherst (5 N.Y. stores)	10.0
The Sample Inc. (14 N.Y. stores)	20.0
Sattler's, Inc. (S. P. Dunham Co., Trenton, N.J.) (4 N.Y. stores)	49.0
(Operations are being re-structured.)	
Elmira	
S. F. Iszard & Co. (2 N.Y. stores)	8.0
Endicott	
The Burt Co. (2 Endicott, N.Y. stores)	4.0
Glens Falls	
Economy Dry Goods (2 N.Y. stores)	15.0
Ithaca	
Rothschild Bros. (Also includes McLean's, Binghamton) (3 stores in N.Y.)	6.0
Jamestown	
Bigelow's Dept. Store (Abrahamson-Bigelow Co.) (1 department store, 2 specialty stores in N.Y.)	3.0+
New York City Area (Also see NEW JERSEY listings)	
Abraham & Straus (Federated, Cincinnati, Ohio) (11 stores: N.Y. 8, N.J. 3)	512.0
Fulton St., Brooklyn	130.0
Babylon	18.0
Garden City	6.0
Hempstead	58.0

(New York City area continued)

NORTHEAST

	Approx. Sales (Millions of $)
New York City Area (continued)	
Abraham & Straus (continued)	
Huntington	38.0
Manhasset (remodeled and expanded in 1979)	46.0
Monmouth Mall, Eatontown, N.J.	23.0
Paramus Park, N.J.	51.0
Rego Park, Queens	57.0
Smith Haven	33.0
Woodbridge, N.J.	36.0
(A new store, in the Galleria Mall, White Plains, N.Y., was opened in August 1980. Sales in the first year are expected to reach an annual rate of over $40 million.)	
Alexander's (15 stores: N.Y. 12, N.J. 2, Conn. 1)	454.0
(Alexander's acquired Margo's LaMode—a 73-unit Dallas-based chain of specialty stores, with 1978 sales of $36 million, in July 1979.)	
B. Altman & Co. (The Altman Foundation) (6 stores: N.Y. 3, N.J. 2, Pa. 1)	243.0
Fifth Avenue	115.0
Manhasset	28.0
Paramus, N.J.	31.0
St. Davids, Pa.	17.0
Short Hills, N.J.	20.0
White Plains	32.0
Barney's (1 store)	40.0+
Bendel (Genesco) (Purchased from Genesco by G. Stutz and associates in July 1980.) (1 store)	13.0
Bergdorf Goodman (Carter Hawley Hale, Los Angeles, Calif.) (2 N.Y. stores)	63.0
58th St., New York (Renovated in 1979. Further expansion planned.)	55.0
White Plains (Closed Dec. 1979. This store was taken over by Neiman-Marcus, Dallas, renovated and reopened Sept. 8, 1980. An annual rate of sales of $22 million is expected the first year, with volume reaching $30 million by 1985.)	8.0
Bloomingdale's (Federated, Cincinnati, Ohio) (15 stores: N.Y. 6, Conn. 1, Mass. 1, N.J. 2, Md. 1, Pa. 3, Va. 1)	518.2
New York City area (9 stores)	404.0
59th St. (renovated in 1979)	213.0
Fresh Meadows	16.0
Garden City	29.0
Manhasset (home furnishings store)	9.0
Scarsdale (home furnishings store)	2.0
White Plains	36.0
Riverside Sq., Hackensack, N.J.	39.0

(New York City area continued)

NORTHEAST	Approx. Sales (Millions of $)
NEW YORK (continued)	
New York City Area (continued)	
Bloomingdale's (continued)	
Stamford, Conn.	$ 29.0
Short Hills, N.J.	31.0
Available sales estimates for other stores:	
Northeast:	
Boston, Mass. (2 stores)	20.0
Philadelphia, Pa. (3 stores)	31.5
South:	
Tyson's Corner, McLean, Va.	30.5
White Flint, Kensington, Md.	32.0
Bonwit Teller (acquired by Allied Stores from Genesco in April 1979.) (12 stores: N.Y. 2, N.J. 1, Pa. 3, Mich. 1, Mass. 1, Ill. 2, Fla. 1, Calif. 1)	95.0
New York City area (4 stores)	31.0
Fifth Avenue (closed in Spring 1979. A new flagship store is to be opened by the end of 1980.) (Sales volume represents a 3-month volume before going-out-of-business sale)	12.0
Manhasset	8.0
Short Hills, N.J. (renovated in 1980)	5.0
Westchester (Scarsdale), N.Y.	6.0
Available sales estimates for other stores:	
Northeast:	
Boston, Mass.	10.0
Philadelphia, Pa. (3 stores)	18.0
North Central:	
Michigan Ave., Chicago, Ill.	18.0
Oakbrook, Chicago, Ill.	6.0
Troy, Mich.	8.0
South:	
Palm Beach, Fla.	5.0+
West:	
Beverly Hills, Calif.	9.0
B. Gertz, Plainview, N.Y. (Allied Stores, New York, N.Y.) (7 stores in Long Island, N.Y. Jamaica store closed end of Dec. 1980.)	92.0
Gimbels-New York (Brown & Williamson, New York, N.Y.) (11 stores in N.Y., N.J. and Conn.)	255.0
Korvette's (Purchased by Agache-Willot (France) in 1979 from Arlen Realty & Development Corp.) (50 stores in N.Y., N.J., Pa., Md., Mich., Va. Store closings underway in 1980.)	
10-month period ending Dec. 31, 1979	492.3
Lord & Taylor (Associated Dry Goods, New York, N.Y.) (33 stores: N.Y. 4, Conn. 2, Mass. 3, Md. 1, N.J. 2, Pa. 2, Va. 1, D.C. 1, Fla. 1, Ga. 1, Ill. 7, Mich. 3, Tex, 5)	404.0

(New York City area continued)

	Approx. Sales (Millions of $)
NORTHEAST	
NEW YORK (continued)	
New York City Area (continued)	
Lord & Taylor (continued)	
New York area (7 stores)	$ 133.0
Fifth Avenue	70.0
Garden City	12.0
Huntington Clearance Center	1.0
Manhasset	10.3
Millburn, N.J.	9.5
Paramus Park, N.J.	12.3
Westchester (Scarsdale), N.Y.	17.9
Available sales estimates for other stores:	
Northeast:	
Hartford, Conn.	10.0
Boston area (3 stores)	22.0
Philadelphia, Pa. area (2 stores: Bala Cynwyd, Jenkentown)	25.0
North Central:	
Chicago, Ill. area, total	76.0
Fox Valley	5.5
Hawthorn	6.0
NorthBrook	13.0
Oakbrook	12.5
Old Orchard	5.0
Water Tower Place	22.0
Woodfield	11.0
Detroit, Mich. area, total	37.0
Fairlane	13.0
Lakeside	11.0
Twelve Oaks	13.0
South:	
Chevy Chase, Md.	15.8
White Flint, Md.	12.1
Falls Church, Va.	14.3
Atlanta, Ga.	12.0
Dallas, Tex. area	
NorthPark	11.9
Prestonwood Center (opened Oct. 1979)	2.8
Houston, Tex. area	
Galleria	11.1
Greenspoint Mall	5.5
Memorial City	7.5

(5 stores were opened by Lord & Taylor in 1979. A West Palm Beach store was opened in Feb. 1980; Ann Arbor, Mich., Aug. 1980. 5 additional Florida east coast branches are to be opened by 1984.)

(New York City area continued)

	Approx. Sales (Millions of $)
NEW YORK (continued)	
New York City Area (continued)	
Macy's New York (R. H. Macy, New York, N.Y.) (15 stores plus 4 furniture clearance centers and 8 auto centers. Stores are operated in N.Y.-14 and Conn. 1)	$ 664.0
Herald Square	225.0
Mays (J. W. Mays, Brooklyn, N.Y.) (8 stores in N.Y.)	183.0
Ohrbach's (AMCENA Corp., New York, N.Y.) (11 stores: N.Y. 3, N.J. 3, Calif. 5)	135.0
Plymouth Shops (Sold by Genesco, Nashville, Tenn., to Allied Stores, New York, N.Y. in 1979) (32 stores)	33.3
Saks Fifth Avenue (Brown & Williamson, New York, N.Y.) (31 stores: N.Y. 2, N.J. 2, Pa. 2, Md. 1, Mass. 1, Mich. 2, Ohio 1, Ill. 2, Ga. 1, Fla. 4, Tex. 1, Ariz. 1, Calif. 8, Mo. 1)	532.0
Fifth Avenue	140 to 145
Other stores in Northeast, incl. White Plains, N.Y., Bergen County & Springfield, N.J., Garden City, N.Y., Boston, Mass., Bala Cynwyd, Pa.)	85.0
Boston Mass.	18.0
Bala Cynwyd, Pa.	12.0
Available sales estimates for other stores:	
North Central:	
Chicago, Ill, area	
North Michigan Ave.	26.0
Old Orchard	13.0
Cleveland, Ohio	8.0
Detroit, Mich.	
Fairland Shopping Center (opened in 1979) Annual rate:	20.0
Somerset	23.5
St. Louis, Mo.	
Frontenac Plaza	16.0+
South:	
Chevy Chase, Md.	25.0
Atlanta, Ga.	12.0
Houston, Tex.	15 to 20
Fla. - Bal Harbour and Palm Beach	30.0
Fort Lauderdale (A replacement store was opened in Nov. 1980)	5.5
West:	
Phoenix	8.0
Southern California (5 stores)	50.0
Northern California (3 stores)	30.0

(Saks Fifth Avenue closed its units in New Center, Detroit and in Ann Arbor, Mich., in 1979; closed an older Palm Beach unit, replacing it with a larger unit, and opened a store in South Coast Plaza, Costa Mesa, Calif.)

(New York City area continued)

NORTHEAST	Approx. Sales (Millions of $)
NEW YORK (continued)	
New York City Area (continued)	
Stern Bros., Paramus, N.J. (Allied Stores) (7 stores)	$ 112.0
Niagara Falls	
Beir Bros. (1 store)	4.0
Oneonta	
Bresee's Oneonta Dept. Store (1 store)	5.0
Patchogue	
Swezey & Newins (2 stores)	12.0
Rochester	
B. Forman & Co., Midtown Plaza (5 N.Y. stores)	20.0
McCurdy & Co. (6 N.Y. stores)	60.0
Sibley, Lindsay & Curr (Associated Dry Goods, New York, N.Y.) (9 N.Y. stores)	110.0
Schenectady	
The Carl Co. (5 N.Y. stores)	8.0
Seaford	
Mid-Island Dept. Stores (6 L.I., N.Y. stores)	13.0
Syracuse	
The Addis Co. (4 stores in N.Y.)	10.0+
C. E. Chappell & Sons, Northern Light Shopping Center (5 N.Y. stores)	14.0
Dey Brothers (Allied Stores, New York) (4 N.Y. stores)	40.0
PENNSYLVANIA	
Allentown	
Bamberger's (Bamberger's, Newark, N.J.) (1 branch store)	25.0+
Hess's (Crown American Corp.) (18 stores: 17 stores in Pa., 1 in Md.)	159.8
(The 18th unit was opened at Frackville, Pa. The 19th unit in Sangertown Sq. Mall, near Utica, N.Y., and a unit at Arnot Mill, near Elmira, N.Y. were opened in 1980. Other upper New York stores are planned.)	
H. Leh & Co. (3 stores in Pa.)	12.0+
Altoona	
William F. Gable Co. (Fowler, Dick & Walker, Binghamton, N.Y.) (1 store)	10.0

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
PENNSYLVANIA (continued)	
Greensburg	
Troutman's (Allied Stores, New York, N.Y.) (8 stores in Pa.)	$ 38.9
Harrisburg	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (6 stores in Pa.)	55.0
Hazelton	
P. Deisroth's Sons (2 stores in Pa.)	4.0
Johnstown	
Glosser Brothers, Inc. (1 store) (Also operates Gee Bee Discount Stores and 3 supermarkets. Total volume for all operations is estimated at about $160 million.)	25.0
Lancaster	
Watt & Shand (2 stores in Pa.)	23.0
Levittown	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (8 stores: Pa. 7, Dela. 1)	60.0
Philadelphia Area	
B. Altman, St. Davids (B. Altman, New York, N.Y.) (1 store)	17.0
Bloomingdale's (Bloomingdale's, New York, N.Y.) (3 stores, incl. 1 home furnishings store and a King of Prussia branch which was opened in 1979.)	31.5
Bonwit Teller (Bonwit Teller, New York, N.Y.) (3 stores)	18.0
Philadelphia (Renovations underway in 1980)	9.0
Jenkintown	6.0
Wynnewood (Closed in summer 1980)	3.0
Gimbel's-Philadelphia (Brown & Williamson, New York, N.Y.) (10 stores: Pa. 8, N.J. 2)	135.0
The Gallery	31.5
Lord & Taylor (Lord & Taylor, New York, N.Y.) (2 stores: Bala Cynwyd & Jenkintown)	25.0
Saks Fifth Avenue, Bala Cynwyd (Saks Fifth Avenue, New York, N.Y.)	12.0
Strawbridge & Clothier (11 department stores: Pa. 8, N.J. 2, Del. 1, plus Clover Stores)	367.2
Department stores (11 stores)	250.0
The Gallery, Philadelphia	67.0
John Wanamaker (Carter Hawley Hale, Los Angeles, Calif.) (15 stores: Pa. 12, N.Y. 1, N.J. 2) (Also operates Cleland Simpson, Scranton, Pa. and Globe Store, Scranton, Pa.)	328.4
Pittsburgh	
Gimbel's-Pittsburgh (Brown & Williamson, New York, N.Y.) (6 stores in Pa.)	133.9
Joseph Horne (Associated Dry Goods, New York, N.Y.) (13 stores: Pa. 11, Ohio 2, plus 2 Boston Stores in Pa.)	187.7

(Pittsburgh continued)

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
NORTHEAST	
PENNSYLVANIA (continued)	
Pittsburgh (continued)	
Kaufman's Department Stores (May Department Stores, St. Louis, Mo.) (10 stores: Pa. 8, Ohio 2)	$ 253.7
Metropolitan area (7 stores, incl. Century III unit which was opened in October 1979 and which is expected to reach an annual rate of $14 million in its first year.)	207.0
Reading	
Boscov's (6 stores in Pa.) (Acquired 2 Fowler, Dick & Walker's Boston Stores, Wilkes Barre and Hazelton, Pa., in August 1980.)	110.0
Scranton	
Globe Store (Cleland-Simpson) (John Wanamaker, Philadelphia, Pa.) (1 store)	20.0
Stroudsburg	
A. B. Wyckoff (1 store in Pa., 1 in N.J.)	4.0
Uniontown	
Metzler's Department Store (2 stores in Pa.)	4.0
Wilkes-Barre	
Fowler, Dick & Walker's Boston Stores (2 stores) (Sold to Boscov's, Reading, Pa. in 1980)	15.0
Wilkes Barre (To be remodeled and renamed Bosco's Boston Store)	11.5
Hazleton (To be closed)	3.5
RHODE ISLAND	
Providence	
The Outlet Dept. Stores (Operates 8 Edward Malley Co. stores: Conn. 2, Mass. 2, R.I. 4) (Also operates Hughes & Hatcher Men's Wear Division. The Outlet Co. agreed to sell this and its department stores to United Department Stores, Trenton, N.J., Nov. 1980.)	100.0
NORTH CENTRAL	
ILLINOIS	
Bloomington	
Rolands of Bloomington Inc. (2 stores in Ill.)	6.0
Champaign	
Robeson's Inc. (1 store)	7.0
Chicago Area	
Baskin (Hart Schaffner & Marx) (25 stores)	35 to 40
Bonwit Teller (Bonwit Teller, New York, N.Y.) (2 stores)	24.0
Michigan Avenue	18.0
Oakbrook	6.0

(Chicago area continued)

NORTH CENTRAL

	Approx. Sales (Millions of $)
ILLINOIS (continued)	
Chicago area (continued)	
Carson Pirie Scott & Co. (27 stores, incl. 17 in Chicago Div. and 10 in Community Stores Div., Peoria)	$ 434.3
14 Chicago area stores	250.0
State St.	75.0
Aurora	2.2
Evergreen Plaza	26.0
Lakehurst	8.0
Yorktown	26.0
Community Family Centers (11 stores in Chicago area)	60.0
Crawford Department Stores (4 stores in Ill.)	9.5
Evans Inc. (9 specialty stores plus leased fur departments in Ill., S.C., Ind., D.C.)	79.0
Goldblatt's (39 stores plus furniture outlets and home improvement centers in Ill., Ind., Mich., and Wis., 6 Wasson's Stores in Ind.)	306.6
Chicago area (21 stores)	200.0
State St. (incl. $26 million in main store, $6 million in Bargain Basement)	32.0
K mart (50 stores in Chicago area)	253 to 275
Lord & Taylor (Lord & Taylor, New York, N.Y.) (7 stores)	76.0
Fox Valley	5.5
Hawthorne	6.0
Northbrook Court	13.0
Oakbrook	12.5
Old Orchard	5.0
Water Tower Place	22.0
Woodfield	11.0
Lytton's (Cluett Peabody) (13 stores in Ill. Also operates Young-Quinlan, Minneapolis, Minn.)	50.0
Madigan Brothers, River Forest, Ill. (6 specialty stores in Ill.)	50.0
I. Magnin & Co. (I. Magnin, San Francisco, Calif.) (1 store plus Ware Fur Boutique which does $2 million in sales)	22.0
Northbrook Court (Store opened October 1979. 1st year volume projected to $11.0 million.)	
Marshall Field (Marshall Field & Co. which merged with J.B. Ivey & Co. in October 1980.)	
Chicago Stores Division (16 stores: Ill. 15, Wis. 1)	470.0
State St.	148.0
Oakbrook	9.0
Old Orchard	62.0
Park Forest	8.5
River Oaks	26.0
Woodfield	36.0
Montgomery Ward (410 stores throughout the U.S., and catalog operations)	5,251.1
16 Chicago area stores	279.0

(Chicago area continued)

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
ILLINOIS (continued)	
Chicago area (continued)	
Montgomery Ward (continued)	
State St.	$ 28.0
Evergreen Plaza	28.0
North Riverside Mall	22 to 28
Neiman Marcus (Neiman Marcus, Dallas, Texas) (1 store)	
Northbrook Court	19.0
The People's Store of Roseland (2 stores)	18.0
J. C. Penney (30 stores in area)	350 to 400
Ford City Shopping Center	30 to 35
Lakehurst	20.0
Woodfield	45.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (2 stores)	39.0
North Michigan Avenue	26.0
Old Orchard	13.0
(A new Oak Brook store will be opened in 1981)	
Sears Roebuck (32 area stores, incl. department, catalog and appliance)	750.0
State St.	45.0
Northbrook Court	18.0
Oak Brook	70 to 75
River Oaks	70 to 75
Tower	14.0
Woodfield	70 to 75
Spurgeon Mercantile (72 stores in Ill., Ind., Iowa, Mich., Minn. and Wis.)	48.8
Charles A. Stevens & Co. (Hart Schaffner & Marx) (20 specialty stores)	50.0
Venture Stores Inc. (May Dept. Stores Co.) (22 area stores, incl. 13 Turnstyle units taken over in 1978.)	260.0
Wieboldt Stores, Inc. (13 stores in Ill.)	169.7
Elgin	
Ackemann Bros. (2 stores in Ill.)	5.0
Joseph C. Spiess Co. (3 stores in Ill.)	12.0
Granite City	
The Glik Co. (13 stores: Ill. 12, Mo. 1)	4.0+
Joliet	
Al Baskin Co. (5 stores, incl. 4 Mark Shale Stores)	15.0
Peoria	
P. A. Bergner Co. (also operates Chas. V. Weise Co., Rockford and Myers Brothers, Springfield, Ill.) (27 stores in Ill.)	150.0
Szold's Inc. (2 stores in Ill.)	7.0
River Forest	
Madigan's (5 stores in Ill.)	27.0

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
ILLINOIS (continued)	
Rockford	
The Chas. V. Weise Co. (P. A. Bergner Co., Peoria, Ill.) (8 stores: Ill. 6, Wis. 2)	$ 50.0
Springfield	
Famous Barr (Famous Barr, St. Louis, Mo.) (1 branch store) White Oaks Mall	13.0
Myers Bros., Inc. (P. A. Bergner Co., Peoria, Ill.) (4 stores in Ill.)	16.0
Stix Baer & Fuller (Stix Baer & Fuller, St. Louis, Mo.) (2 stores) (Downtown store closed in 1979, leaving 1 store in White Oaks Mall)	5.0
INDIANA	
Hammond	
Edward C. Minas Co. (3 stores. Ill. 2, Ind. 1)	8.0
Indianapolis	
L. S. Ayres & Co. (Associated Dry Goods, New York, N.Y. (12 department stores in Ind.) (The University Park, Mishawaka, Ind., store was opened in May 1979. Ayres also operates specialty stores with a volume of about $20 million.)	120.0
William H. Block Co. (Allied Stores, New York, N.Y.) (9 stores in Ind.)	78.2
Lafayette	
Loeb's Inc. (3 stores in Ind., plus Furniture Galleries)	5.0
Muncie	
Ball Stores (3 stores in Ind. Also operates Ball Stores Collegienne Shops)	9.0
Terre Haute	
Schultz & Co. (2 stores)	47.6
Valparaiso	
Lowenstine (1 store)	3.0
IOWA	
Cedar Rapids	
Armstrong's (1 store)	20.0
Killian Co. (3 stores in Iowa)	12.0
Davenport	
Peterson-Harned-Von Maur (7 stores: Ia. 5, Ill. 2)	15 to 20

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
IOWA (continued)	
Des Moines	
Younker's Dept. Store (Equitable of Iowa Companies, Des Moines, Ia.) (27 stores: Ia 21, Ill. 1, Neb. 3, Minn. 1, S.D. 1)	$ 141.9
Main store, Des Moines	50.0+
Dubuque	
Roshek's (Gamble Dept. Stores Inc., Chicago, Ill.) (1 store)	8.0
MICHIGAN	
Detroit Area	
Bonwit Teller, Troy (Bonwit Teller, New York, N.Y.) (1 branch store)	8.0
Crowley Milner & Co. (8 stores in Mich.)	59.4
Hudson's (Dayton Hudson) (16 stores: Mich. 15, Ohio 1)	652.0
Novi, Twelve Oaks	45.0
Westland	44.0
Toledo, Ohio	20.0
(A store was opened in West Lansing in 1979; in South Bend, Ind. in Feb. 1980; in Kalamazoo, July 1980.)	
Hughes & Hatcher Men's Wear Div. (The Outlet Co., Providence, R.I.)	96.6
(This division was sold by The Outlet Co. to United Dept. Stores, Trenton, N.J. in Nov. 1980.)	
Jacobson Stores, Jackson (16 department stores: Mich. 11, Ohio 1, Fla. 4, plus 7 home furnishings stores and 1 children's wear store)	150.0
Michigan stores (11)	135.0
Lord & Taylor, (Lord & Taylor, New York, N.Y.) (3 branch stores)	37.0
Fairlane	13.0
Twelve Oaks	13.0
Lakeside	11.0
(A Lord & Taylor store was opened in Ann Arbor, Mich. in Aug. 1980)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (2 branch stores)	43.5
Fairlane Shopping Center (Dearborn) (opened in late 1979) Annual rate:	20.0
Somerset (enlarged in 1979)	23.5
(The New Center and Ann Arbor stores were closed in 1979)	
Sears Roebuck (Sears Roebuck & Co., Chicago, Ill.)	
Detroit area stores	420.0
Winkelman's, total (82 women's specialty stores)	90.3
Detroit area stores	55.0
Flint	
The Fair (Interstate Dept. Stores, New York, N.Y.) (5 stores in Mich.)	7.0

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx.Sales (Millions of $)
MICHIGAN (continued)	
Grand Rapids	
Herp's (Allied Stores, New York, N.Y.) (2 stores in Mich.)	$ 15.0
Paul Steketee (6 stores in Mich.)	21.0
Kalamazoo	
Gilmore Bros. (3 stores in Mich.)	11.0
Saginaw	
W. C. Wiechmann Co. (3 stores in Mich.)	8.0
Traverse City	
J. W. Milliken (3 stores in Mich.)	5.0
MINNESOTA	
Duluth	
Duluth Glass Block Stores (2 stores in Minn.) (Also operates O. U. deLendrecie Co., Fargo, N.J., which has a volume of $4.0 million)	20.0
Mankato	
Bretts Dept. Store (4 stores in Minn.)	10.0
Minneapolis	
Dayton's (Dayton Hudson, Minneapolis, Minn.) (12 stores: Minn. 9, N.D. 2, S.D. 1) (LaCrosse, Wis., store opened in July 1980.)	357.0
Donaldson's (Allied Stores, New York, N.Y.) (8 stores: Minn. 7, Ia. 1)	98.0
Powers Dry Goods (Associated Dry Goods, New York, N.Y.) (7 stores in Minn.)	65.0
St. Cloud	
Fandel (2 dept. stores in Minn., plus 2 Intrigue Spec. Stores in Minn.)	4.0
Herberger's (19 stores: Minn. 7, Mont. 2, N.D. 2, S.D. 5, Wis. 2, Wyo. 1)	35.0
MISSOURI	
Joplin	
Newman Mercantile Co. (4 stores: Kans. 1, Mo. 2, Okla. 1, plus a furniture store in Joplin)	10.0
Kansas City	
Harzfeld's (Garfinckel, Brooks Bros., Miller & Rhoads, Wash., D.C.) (8 stores: Kans. 2, Mo. 4, Okla. 2)	38.0
Jack Henry Clothing (Hart, Schaffner & Marx, New York, N.Y.) (5 stores)	10.0+
The Jones Store Co. (Mercantile Stores, New York, N.Y.) (5 stores: Kans. 3, Mo. 2)	90.0

(Kansas City continued)

NORTH CENTRAL

	Approx. Sales (Millions of $)
MISSOURI (continued)	
Kansas City (continued)	
Macy's Missouri-Kansas (R. H. Macy, New York, N.Y.) (12 stores: Kans. 5, Mo. 7) (Effective Nov. 1980, the buying function of LaSalle's, Toledo, Ohio and Macy's, Mo.-K.C. were consolidated with headquarters in K.C.)	$ 105.0
Stix, Baer & Fuller (Stix, Baer & Fuller, St. Louis, Mo.) (3 stores)	
Kansas City area	27.5
Ward Parkway, Kansas City	14.0
Oak Park, Overland Park, Kans.	7.5
Independence, Mo.	6.0
Other stores:	
White Oaks Mall, Springfield, Ill.	5.0
St. Louis Area	
Famous Barr (May Department Stores, St. Louis, Mo.) (9 department stores and 1 apparel specialty store in St. Louis; 2 department stores in Ill.)	292.5
Department store total	287.5
St. Louis area stores: (9 department stores, 1 apparel store)	267.5
Downtown	53.0
Clayton	26.0
Crestwood	15.0
Northland	25.5
Northwest Plaza	33.0
St. Clair	32.0
South County	24.0
Southtown	21.5
West County	32.5
F-B Ltd. (apparel specialty store)	5.0
Other stores:	
Alton Square, Alton, Ill.	12.0
White Oaks Mall, Springfield, Ill.	13.0
Grandpa's (5 stores)	35 to 40
K mart (19 stores, including 3 Zayre store locations taken over in 1979 and new store opened in Alton, Ill. in Sept. 1979)	140.0
Neiman-Marcus (Neiman-Marcus, Dallas, Texas) (1 store)	
Frontenac Plaza	13.0
J.C. Penney (6 full-line stores, including Alton Sq., Alton, Ill. store opened in Nov. 1979, and 6 soft goods stores)	115.0
(Also operated a surplus catalog outlet, East Alton, Ill.)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (1 store)	
Frontenac Plaza	16.0+
Sears, Roebuck & Co. (7 A and B full-line stores; 2 catalog stores and an outlet store)	135.0
Northwest Plaza	38.0

(St. Louis area continued)

NORTH CENTRAL	Approx. Sales (Millions of $)
MISSOURI (continued)	
St. Louis Area (continued)	
Stix, Baer & Fuller (Associated Dry Goods, New York, N.Y.) (14 stores: 8 St. Louis area stores, 3 in Kansas City area, 1 in Fairview Hts., Ill. - open April 1979, 2 John Bressmer Co. stores in Springfield, Ill.)	$ 138.5
St. Louis area stores	106.0
Downtown	18.0
Chesterfield Mall	13.0
Crestwood	16.0
Jamestown	10.0
Northwest Plaza	11.0
River Roads (warehouse clearance outlet switched to this store from downtown store)	11.0
St. Clair Square (opened April 1979)	8.0
Westroads	19.0
Other Stores:	
Independence, Mo.	6.0
Oak Park, Overland Park, Kansas	7.5
Ward Parkway, Kansas City, Kansas	14.0
Springfield, Ill. (2 stores including downtown store which was closed in 1979, leaving 1 store in White Oaks Mall.)	5.0
(Stix opened a 9th St. Louis area store in South County shopping center, in February 1980.)	
Target Stores (Dayton Hudson) (10 stores, including 3 opened in 1979)	110.0
Venture Stores (May Department Stores) (12 stores in St. Louis area)	170.0
Wal-Mart (8 stores, including 3 opened in 1979)	35 to 40
NEBRASKA	
Fremont	
George Schweser's & Sons (8 stores in Neb.)	8.0
Lincoln	
Miller & Paine (3 stores in Neb.)	25.0
Omaha	
J. L. Brandeis & Sons (15 stores: Iowa 2, Neb. 13)	92.0
NORTH DAKOTA	
Fargo	
Herbst, Inc. (4 stores in N.D.)	5.0
O. J. de Lendrecie Co. (Branch of Duluth Glass Block Stores, Co., Duluth, Minn.) (1 store in N.D.)	4.0

DEPARTMENT STORE SALES

NORTH CENTRAL

OHIO

	Approx. Sales (Millions of $)
Akron	
The M. O'Neil Co. (May Dept. Stores Co., St. Louis, Mo.) (9 stores in Ohio)	$ 121.5
Ashtabula	
Carlisle-Allen (11 stores: Ohio 6, Pa. 5)	45.0
Bowling Green	
Fred W. Uhlman & Co. (10 department stores in Ohio. Also operates specialty stores in Ohio, Mich. and Ind.)	13.0
Cincinnati	
McAlpin Co. (Mercantile Stores Co., New York, N.Y.) (9 stores: Ohio 5, Ky. 4)	100.0+
H & S. Pogue Co. (Associated Dry Goods, New York, N.Y.) (5 stores: Ohio 4, Ky. 1)	75.0
Shillito's (Federated Dept. Stores, Cincinnati, Ohio) (9 stores: Ohio 7, Ky. 2)	211.6
Cleveland	
Halle's (Marshall Field & Co., Chicago, Ill.) 9 stores: Ohio 7, Pa. 2 (Sandusky, Ohio branch opened in spring 1980. Halle's bought Union Co., Columbus, Ohio stores in May 1980.)	110.0
The Higbee Co. (11 department stores in Ohio. Also a home store, a budget store and 8 Shoe Lace Stores in Cleveland area)	197.4
Department stores (11 stores)	185.0
The May Co. (May Dept. Stores, St. Louis, Mo.) (10 stores in Ohio)	220.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (1 store)	8.0
Columbus	
Lazarus (Federated Dept. Stores, Cincinnati, Ohio) (14 stores: Ohio 11, Ind. 3) (Also operates a Home Store and 3 Capri Shops) (Indianapolis, Ind. branch opened in the fall of 1980)	325.4
The Union Co. (Manhattan Industries, New York, N.Y. Sold to Halle's in May 1980.) (8 specialty stores in Ohio)	28.0
Dayton	
Elder-Beerman Dept. Store Div. (Elder-Beerman Stores Corp.) (20 stores in Ohio)	170.0
Rike's (Federated Dept. Stores, Cincinnati, Ohio) (5 stores in Ohio)	122.9
Jackson	
Stiffler Stores (16 stores in Ohio)	4.0
Portsmouth	
The Marting Bros. (2 stores in Ohio)	6.0
Springfield	
Wren's (Allied Stores, New York, N.Y.) (2 stores in Ohio)	15.0

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
OHIO (continued)	
Toledo	
Hudson's (J. L. Hudson Co., Detroit) (1 store in Franklin Park)	$ 20.0
LaSalle's (R. H. Macy, New York, N.Y.) (7 stores in Ohio) (Buying functions were combined with those of Macy's - Kansas City in Nov. 1980. Headquartered in K.C.)	49.0
Lion Dry Goods (Mercantile Stores, New York, N.Y.) (3 stores in Ohio)	30.0
Wooster	
H. Freedlander Co. (1 store)	4.0
Youngstown	
Strouss (May Dept. Stores, St. Louis, Mo.) (10 stores plus 12 Rivet Stores in Ohio)	75.4
WISCONSIN	
Green Bay	
H.C. Prange (H.C. Prange Co., Sheboygan) (28 store total, incl. Prange-Way Discount Stores)	200.0
Department store division (18 stores)	95.0
LaCrosse	
Wm. Doerflinger Co. (3 stores in Wisc.)	6.0
Madison	
Harry S. Manchester (T. A. Chapman, Milwaukee, Wisc.) (4 stores in Wisc.)	10.0
Marinette	
Lauerman Bros., (4 stores: Mich. 2, Wisc. 2)	5.0
Milwaukee	
T. A. Chapman (4 stores in Wisc.)	23.0
Gimbel's-Midwest (Brown & Williamson, New York, N.Y.) (11 stores in Wisc.)	154.0
Milwaukee Boston Store (Federated Dept. Stores, Cincinnati, Ohio) (6 stores in Milwaukee)	99.1
Wisconsin Rapids	
Johnson Hills Dept. Stores (3 stores in Wisc.)	6.0
SOUTH	
ALABAMA	
Birmingham	
Loveman's (City Stores, New York, N.Y.) (6 stores in Ala.)	20.0
Parisian Inc. (8 stores in Ala.)	85.0
Pizitz Inc. (10 stores in Ala.)	60.0

SOUTH	Approx. Sales (Millions of $)
ALABAMA (continued)	
Florence	
Rogers Inc. (3 stores in Ala.)	$ 10.0
Huntsville	
Dunnavant's (1 store)	3.0
Mobile	
C. J. Gayfer Co. (Mercantile Stores, New York, N.Y.) (11 stores: Ala. 2, Fla. 6, Miss. 3 and 6 Gayfers (Montgomery) in Ala., Ga.)	120.0
ARKANSAS	
Fort Smith	
Boston Store Dry Goods (2 stores in Ark. plus 4 stores in White House Dry Goods Co. Div., Beaumont, Tex.)	20.0
Hunt Dry Goods (9 stores: Ark. 6, Mo. 1, Okla. 1, Tex. 1)	8.0
Little Rock	
M. M. Cohn (7 stores: Ark. 4, Tenn. 3)	22.0
Dillard Dept. Stores Little Rock Division (13 stores: Ark. 7, La. 3, Tex. 3)	115.6
DELAWARE	
Claymont	
The Dry Goods (SCOA Industries, Columbus, Ohio) (4 stores)	35.0+
Wilmington	
Kennard's Department Stores (3 stores in Dela.)	5.0
DISTRICT OF COLUMBIA	
Washington Area (Including nearby Baltimore and Maryland stores. Also see Baltimore, Md. listings)	
Bloomingdale's (Bloomingdale's, New York, N.Y.) (2 branch stores)	62.5
Tyson's Corner, McLean, Va.	30.5
White Flint, Kensington, Md.	32.0
Britches of Georgetown, Alexandria, Va. (Canterbury Tales) (14 stores)	13.0
Garfinckel's (Garfinckel, Brooks Bros., Miller & Rhoads) (7 stores: D.C. 2, Md. 2, Va. 3 plus 2 hotel shops)	68.0
The Georgetown University Shop (2 specialty stores incl. Chevy Chase store which was opened in Spring 1979. Both sold Nov. 1980 to John B. Smoot)	
Georgetown Campus store	2.5

(Washington area continued)

SOUTH	Approx. Sales (Millions of $)
DISTRICT OF COLUMBIA (continued)	
Washington Area (continued)	
Hecht's (May Department Stores Co., St. Louis, Mo.) (20 stores: Md. 15, D.C. 1, Va. 4. 2 stores, Security Mall, Baltimore and Annapolis, Md. were opened in 1979)	$ 325.0
Washington Metropolitan Area	271.0
(A branch will be opened at Fair Oaks, Woodbridge, Va.)	
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 branch stores)	42.2
Chevy Chase, Md.	15.8
Falls Church, Va.	14.3
White Flint, Kensington, Md.	12.1
(A 4th branch in this area will be opened in 1981)	
I. Magnin (I. Magnin, San Francisco, Calif.) (1 branch store in White Flint, Kensington, Md.)	9.0
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) (1 branch store in Mazza Gallerie, Chevy Chase, Md.)	13.7
Raleighs (12 specialty stores)	55.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (1 branch store in Chevy Chase, Md.)	25.0
Sears Roebuck (Sears Roebuck Co., Chicago, Ill.) (15 stores)	365.0
Metropolitan Washington area (10 stores)	315.0
Woodward & Lothrop (14 stores: D.C. 2, Md. 10, Va. 2)	295.2
Main store, Washington	45.0
Tyson's Corner, McLean, Va.	35.0
(A 15th store, in White Marsh, A Baltimore suburb, will be opened in 1980. A 16th will be opened in Fair Oaks, Woodbridge, Va.)	
FLORIDA	
Bradenton	
Beall's Dept. Stores (19 stores in Fla.)	30.0
Jacksonville	
Furchgott's Inc. (6 stores in Fla.)	16.0
May-Cohens (May Dept. Stores, St. Louis, Mo.) (6 stores in Fla.)	42.2
Miami-Palm Beach Area	
Bonwit Teller, Palm Beach (Bonwit Teller, New York, N.Y.) (1 branch store)	5.0+
Burdine's (Federated Dept. Stores, Cincinnati, Ohio) (16 stores in Fla. plus 2 furniture clearance centers.)	407.0
(Stores in Boca Raton, Fort Myers and West Palm Beach were opened in 1979. A St. Petersburg branch was opened in August 1980; part of a store in Cutler Ridge Shopping Center, Dade County was opened in Oct. 1980. A replacement store for the downtown Ft. Lauderdale store was opened in the Galleria Center in Nov. 1980.)	
JByrons (Jack Eckerd Corp., Clearwater, Fla.) (38 stores in Fla.)	120.0+
(A Fort Myers store was opened in July and one in Bradenton in the fall of 1979. A West Palm Beach store was opened in 1980.)	
Jefferson Stores (Montgomery Ward, Chicago, Ill.) (14 stores in Fla.) (2 additional Fla. units were opened in 1980. Also operates Jefferson Ward stores in Philadelphia, Pa. area)	150.0

(Miami-Palm Beach area continued)

SOUTH	Approx. Sales (Millions of $)
FLORIDA (continued)	
Miami-Palm Beach Area (continued)	
Jordan Marsh-Florida (Allied Stores, New York, N.Y.) (12 stores in Fla.)	$ 175.0
Neiman Marcus (Neiman Marcus, Dallas, Tex.) (1 branch at Bal Harbour)	25.0
Richards (City Stores, New York, N.Y.) (8 stores in Fla.)	55.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (3 Florida branches)	
Bal Harbour & Palm Beach	30.0
Fort Lauderdale (A replacement store was opened in Nov. 1980)	5.5
(Lord & Taylor, New York, N.Y., opened a West Palm Beach store in February 1980 and plans to open five more on the east coast of Florida by 1984.)	
Tallahassee	
Avery's (7 stores: Fla. 1, Ala. 3, Ga. 1, Ky. 2. Also specialty stores in Ala. and Fla.)	7.0
Tampa-St. Petersburg Area	
Maas Bros., Tampa (Allied Stores, New York, N.Y.) (19 stores in Fla.)	252.0
Robinson's of Florida, St. Petersburg (Associated Dry Goods, New York, N.Y.) (7 stores in Fla.)	55 to 60
(Burdine opened a store at Crossroads Shopping Center, St. Petersburg in August 1980.)	
Winter Park	
Ivey's-Florida (J. B. Ivey & Co., Charlotte, N.C.) (10 stores in Fla.)	67.0
GEORGIA	
Atlanta Area	
J.P. Allen & Co. (Hart, Schaffner & Marx, New York) (6 stores in Ga.)	15.0+
Davison's (R. H. Macy Inc., New York) (11 stores in Ga.)	142.0
H. Kessler & Co. (6 stores in Ga. and a wholesaling operation)	12.0
Lord & Taylor (Lord & Taylor, New York) (1 store)	12.0
Rich's (Federated Dept. Stores, Cincinnati, Ohio) (15 stores: Ga. 12, Ala. 2, S.C. 1)	328.8
(A Haywood Mills, Atlanta store, and one in Greenville, S.C. were opened in the fall of 1980.) (Rich's also operated 18 Richway Discount Stores, with a volume of $205.4 million. Three stores in this operation will be opened in 1980.)	
Saks Fifth Avenue (Saks Fifth Avenue, New York) (1 store)	12.0
Augusta	
J. B. White & Co. (Mercantile Stores, New York, N.Y.) (2 stores in Ga.)	13.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
GEORGIA (continued)	
Columbus	
J. A. Kirven Co. (3 stores in Ga.)	$ 6.0
Cordele	
I. Perlis & Son (operates 6 stores in Ga.: The Big Store, The Fair Store and Halperin's Dept. Store)	2.0+
Savannah	
Levy's of Savannah, Ga. (Allied Stores, New York, N.Y.)	11.0
KENTUCKY	
Ashland	
C. H. Parsons Co. (1 store)	6.0
Danville	
Hub Frankel Co. (1 store)	4.5
Louisville	
J. Bacon & Co. (Mercantile Stores, New York, N.Y.) (5 stores: Ind. 1, Ky. 4)	30.0
Levy Bros. Inc. (4 specialty stores in Ky.)	4.0
Shapira Corp. (16 stores in Ky., including The Hub Store, Elizabethtown, 12 Louisville stores, The People's Store, Radcliff, The Lincoln Shop and The Town & Country Store, Bardstown)	6.0+
Ben Snyder Inc. (8 stores: Ind. 2, Ky. 6)	22.0
Stewart Dry Goods (Associated Dry Goods, New York, N.Y.) (7 stores: Ind. 1, Ky. 6)	60.0
Madisonville	
Baker & Hickman (1 store plus Tiny Town in Madisonville)	2.0
Owensboro	
S. W. Anderson Co. (2 stores in Ky.)	6.0
LOUISIANA	
Alexandria	
Weiss & Goldring (2 stores in La.)	4.0
Wellan's (2 stores in La.)	8.5
Baton Rouge	
Goudchaux's Inc. (3 stores in La.)	65.0
Lake Charles	
Muller Co. Ltd. (Allied Stores) (2 stores in La.)	4.0

SOUTH

	Approx. Sales (Millions of $)
LOUISIANA (continued)	
New Orleans	
Leon Godchaux Clothing Co. (7 stores: La. 6, Miss. 1)	$ 28.0
D. H. Holmes (13 stores: La. 12, Miss. 1)	176.5
Krauss Co. Ltd. (1 store)	18.0
Maison Blanche (City Stores, New York, N.Y.) (8 stores in La.)	65 to 70
Shreveport	
Palais Royal (3 stores in La.)	8.5
Rubenstein's Inc. (4 stores in La.)	7.0
Selber Brothers Inc. (7 stores: Tex. 3, La. 4)	12.0
MARYLAND	
Baltimore (Also see: Washington, D.C. Area)	
Brager-Gutman (HRT Ltd., Honolulu, Hawaii) (2 stores in Md.)	8.0
L. Epstein (7 stores in Baltimore, Md.)	20.0
Hochschild Kohn & Co. (Supermarkets General) (8 stores) (A specialty unit in Easton, Md. was opened in 1979. Newburgh, N.Y. store will be opened in 1980.)	59.0
Hutzler Bros. (6 stores in Md.)	77.3
Stewart & Co. (Associated Dry Goods) (5 stores in Md.)	75.0
MISSISSIPPI	
Jackson	
McRae's (11 stores: Miss. 10, Fla. 1) (11 stores)	70.0+
Oxford	
J. E. Neilsen Co. (1 store)	2.0
NORTH CAROLINA	
Asheville	
Bon Marche, Inc. (Meyers/Arnold, Greenville, S.C.) (3 stores)	6.0
Burlington	
B. A. Sellers & Sons (2 stores)	3.0
Charlotte	
Collins Dept. Stores (10 stores)	20.0
Ivey's Carolinas (J. B. Ivey & Co.) (13 stores in N.C.)	80.0
Elkin	
Spainhour (Sydnor Spainhour Co., Elkin, N.C.) (5 stores in N.C.)	4.0
Whiteville	
Leder Bros. (11 stores: N.C. 8, S.C. 4)	6.0+
Winston-Salem	
Davis Inc. (3 stores in N.C.)	5.0+

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
OKLAHOMA	
Oklahoma City	
John A. Brown Co. (Dayton Hudson) (5 Okla. stores. A fourth Oklahoma City store was opened in the fall of 1980.)	$ 48.9
Shawnee	
Newton Wall Co. (15 stores: Okla. 9, Miss. 4, Ark. 1, Tex. 1)	7.5
Tulsa	
Clarke's Good Clothes (7 stores: Okla. 6, Ark. 1)	14.0
Froug Co. (10 stores: Okla. 9, Ark. 1)	17.0
SOUTH CAROLINA	
Anderson	
Gallant-Belk (6 stores: Ga. 2, S.C. 4)	4.0
Charleston	
James F. Condon & Sons (2 stores in Charleston)	5.0
Kerrison's Dept. Stores (4 stores in S.C.)	8.0
Columbia	
James L. Tapp Co. (4 stores in Columbia)	12.0
Greenville	
Meyers-Arnold (4 stores. Also operates a division in Asheville--Bon Marche)	25.0
Hartsville	
J. L. Coker Co. (4 stores in S.C.)	6.0
Spartanburg	
The Aug. W. Smith Co. (4 stores in S.C.)	4.0
TENNESSEE	
Alcoa	
Proffitt's (4 stores in Tenn.)	20.0
Bristol	
H. P. King Co. (2 stores in Tenn. Also operates Dosser's Inc., Johnson City)	3.5+
Chattanooga	
Loveman's Inc. (5 stores: Tenn. 4, Ga. 1)	22.0
Johnson City	
Kings Inc. (1 store)	2.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
TENNESSEE (continued)	
Knoxville	
Miller's (Garfinckel, Brooks Bros., Miller & Rhoads, Washington, D.C.) (11 stores: Ga. 2, Tenn. 9)	$ 70.0
Ira A. Watson Co. (17 stores: Ala. 3, Ky. 6, Tenn. 4, Va. 1, W. Va. 3)	39.9
Memphis	
Goldsmith's (Federated Dept. Stores) (4 stores)	112.1
(Southland Mall, Memphis, store to be expanded in 1980)	
B. Lowenstein & Bros. (City Stores Corp., New York, N.Y.) (4 stores)	30.0+
Nashville	
Cain-Sloan (Allied Stores, New York, N.Y.) (4 stores in Tenn.)	56.5
Castner, Knott Dry Goods Co. (Mercantile Stores, New York, N.Y.) (11 stores: Ala. 2, Ky. 1, Tenn. 8)	40.0+
The Harvey Co., (6 stores in Tenn.)	28.0
TEXAS	
Abilene	
Thornton's Dept. Stores (P. N. Hirsch & Co., St. Louis, Mo.) (9 stores in Tex.)	10 to 15
Austin	
Scarbroughs Dept. Stores (3 stores in Texas)	18.0
(A branch of Foley's, Houston was opened in Austin in Oct. 1979. Annual rate expected to reach $23 million.)	
Beaumont	
The Fair Inc. (23 stores in Tex. and La.)	50.0
White House Co. (Boston Store Dry Goods Co., Fort Smith, Ark.) (4 stores)	20.0
Dallas (also see Fort Worth)	
Harold's, Highland Park Village (1 store)	2.0
Joske's-Dallas/Phoenix (Allied Stores, New York, N.Y.) (13 stores: Tex. 11, Ariz. 2)	124.0
Dallas area (11 stores)	110.0
NorthPark	25.0
(Prestonwood Center store was opened in April 1979. 1st year volume is expected to reach $14 million. Richardson Square store was opened October 1979. Lockwood Mall store is to be closed)	
Other stores:	
Phoenix, Ariz. (2 stores acquired from Liberty House)	14.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (2 branch stores)	14.7
NorthPark	11.9
Prestonwood Center (opened October 1979)	2.8
(Plano Mall store is to be opened in 1981)	

(Dallas continued)

SOUTH	Approx. Sales (Millions of $)
TEXAS (continued)	
Dallas (continued)	
Margo's La Mode (73 specialty stores in Tex., N.M., Ark., Ga., and Okla. Purchased by Alexander's, New York, N.Y. in July, 1979)	$ 38.0
Montgomery Ward (Montgomery Ward, Chicago, Ill.) (11 stores in Dallas-Fort Worth area, including Prestonwood Center store which was opened in 1979.)	168.0
Big Town	14.0
Neiman-Marcus (Carter Hawley Hale, Los Angeles, Calif.) (12 stores: Tex. 5, Ga. 1, Fla. 1, Md. 1, Ill. 1, Mo. 1, Ca. 2 and 3 hotel boutiques)	307.0
Dallas-Fort Worth area (4 stores)	115.0
Downtown Dallas	40.0+
NorthPark	40.0+
Prestonwood Center	10.0+
Fort Worth	25.0
Other stores:	
Northbrook Court, Chicago, Ill.	19.0
Frontenac Plaza, St. Louis, Mo.	13.0
Atlanta, Ga.	15.0+
Bal Harbour, Fla.	25.0
Chevy Chase, Md.	13.7
Galleria, Houston, Tex.	38.0
Beverly Hills, Calif.	32.0
Fashion Island, Newport Beach	12.0
(Neiman-Marcus opened a store in Las Vegas in August 1980; in Sept. a unit (formerly a Bergdorf Goodman branch) was opened in White Plains, N.Y., with an expected annual volume of from $18-to-$22 million; $30 million by 1985.)	
J.C. Penney (14 stores)	115.0
NorthPark	28.0
Sanger-Harris (Federated, New York, N.Y.) (11 stores in Tex., including 4 in Dallas area, 2 in Forth Worth)	240.7
Downtown Dallas	25.0
Highland Park Village (opened in 1979)	4.3
Prestonwood Center	32.0
Valley View	55.0
(A Plano Mall store was scheduled to open in the Fall of 1980)	
Sears, Roebuck (Sears, Roebuck, Chicago) (11 stores, including 7 full-line stores plus satellite and catalog stores in the Dallas-Fort Worth area)	260.0
Valley View	45.0
El Paso	
Popular Dry Goods Co. (3 stores in El Paso)	28.0
The United Inc. (13 stores: Ariz. 3, N.M. 4, Tex. 6)	3.5

SOUTH	Approx. Sales (Millions of $)
TEXAS (continued)	
Fort Worth (also see Dallas)	
R. E. Cox & Co. (5 stores in Tex.)	$ 25.0
Dillard Department Stores, Central Division, Fort Worth (Dillard Department Stores, Inc., Little Rock, Ark.) (20 stores: Kans. 1, Mo. 1, Okla. 8, Tex. 10)	163.0
Monnig's (6 stores in Tex.)	30.0+
Neiman-Marcus (Neiman-Marcus, Dallas, Texas) (1 store)	25.0
Stripling's (3 stores in Fort Worth)	15.0
Houston Area	
Battlestein's (Manhattan Industries) (7 stores) (Operations of River Oaks and Memorial City stores being taken over by Frost Bros., San Antonio)	36.0
Cutter Bill Western Wear (2 stores including 1 in Dallas)	7.0
Foley's (Federated, Cincinnati, Ohio) (8 stores in Texas)	412.2
Downtown	70.6
Sharpstown	70.3
Highland Mall, Austin (opened Aug. 1979. Projected annual vol. $23 mil.)	15.8
(A store at San Jacinto, Baytown, Tex., was opened in Fall 1980. North Star store to be opened in 1981, with a projected annual volume of $23 mil.)	
Joske's-Houston (Allied Stores, New York, N.Y.) (8 stores)	120.0
Post Oak (renovated in 1979)	35.0
(Greenspoint Mall store to open in 1980.)	
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 stores)	24.1
Galleria (Houston)	11.1
Greenspoint Mall (opened Feb. 1979)	5.5
Memorial City	7.5
Marshall Field-Southern Division (Marshall Field & Co., Chicago) (1 store)	
Galleria (Houston) (Opened November 1979.) (Projected annual rate:	20.0
(A second Houston area store is to be opened in 1981.)	
Montgomery Ward (Mobil) (7 Houston stores, 1 Beaumont unit)	140.0
(San Jacinto Mall store to open in 1981.)	
Neiman Marcus (Neiman Marcus, Dallas) (1 store)	
Galleria (Houston)	38.0
(Negotiating for a second store in Houston area)	
Oshman's Sporting Goods (85 stores)	120.0
Palais Royal (17 stores in Texas)	60.0
Meyerland (Houston)	8 to 9
Sharpstown (Houston)	6.0
J. C. Penney (8 stores)	125.0
Meyerland (Houston)	30.0
Sakowitz, Inc. (9 stores including 6 in Houston area, 1 in Amarillo, 1 in Scottsdale, Ariz., a boutique in Dallas)	80.0
Houston area stores	65.0
Saks Fifth Avenue Center of Fashion (Saks Fifth Avenue, New York) (1 branch store)	15 to 20

(Houston area continued)

DEPARTMENT STORE SALES

SOUTH

	Approx. Sales (Millions of $)
TEXAS (continued)	
Houston Area (continued)	
Sears Roebuck & Co.	
Houston Metropolitan Area	$ 260.0
Greenpoint	35 to 40
Memorial City	35 to 40
Shepherd	35 to 40
Westwood	35 to 40
Target (Dayton Hudson) (1 store)	100.0
Laredo	
Richter's Dept. Store (1 store)	5.0
Lubbock	
Hemphill-Wells Co. (4 stores in Texas)	20.0
San Antonio	
Dillard Dept. Stores Texas Division (Dillard Dept. Stores, Little Rock, Ark.) (12 stores in Texas)	112.7
Frost Brothers (Manhattan Inds., New York, N.Y.) (10 stores)	60.0+
Joske Bros. (Allied Stores, New York) (7 stores in Texas: San Antonio 4, Beaumont 1, El Paso 1, Austin 1)	100.0
Wichita Falls	
McClurkan's Dept. Store (2 stores in Wichita Falls)	6.0
VIRGINIA (also see District of Columbia)	
Arlington	
Morton's (7 stores: D.C. 3, Md. 3, Va. 1)	8.0+
Lawrenceville	
W. S. Peebles & Co. (30 stores: Del. 1, Md. 5, N.C. 5, Va. 19)	35.0
Martinsville	
Globman's Stores (2 stores in Va.)	6.0
Norfolk	
Rice's-Nachmans (Phillips-Van Heusen Corp., New York, N.Y.) (7 stores in Va.)	15.0
Smith & Welton (7 stores in Va.)	15.0
Richmond	
Miller & Rhoads (Garfinckel, Brooks Bros., Miller & Rhoads, Wash., D.C.) (21 stores: Va. 17, N.C. 4)	125.0
Thalhimer's (incl. North Carolina division) (Carter Hawley Hale, Los Angeles, Calif.) (25 stores: Va. 14, N.C. 11)	165.0

SOUTH	Approx. Sales (Millions of $)
VIRGINIA (continued)	
Roanoke	
S. H. Heironimus Co. (4 stores in Va.)	$ 9.0
WEST VIRGINIA	
Charleston	
A. W. Cox Dept. Store Co. (17 stores: W.Va. 13, Ky. 3, Ohio 1)	9.0+
The Diamond Dept. Store (Associated Dry Goods, New York, N.Y.) (2 stores)	8.0
Fairmont	
J. M. Hartley & Son (1 store)	4.0
Holden	
Island Creek Stores Co. (15 stores in W.Va., Va. & Ky.)	10.0
Logan	
Sayer Bros. (S & B Wholesale Distributors) (8 stores in W.Va.)	7.0+
Parkersburg	
Dils Bros. & Co. (3 stores in W.Va.)	10.0
WEST	
ARIZONA	
Douglas	
Phelps Dodge Mercantile Co., (7 stores: Ariz. 5, N.M. 2)	30.0
Phoenix-Scottsdale Area	
The Broadway Southwest Division, Mesa (Carter Hawley Hale) (9 stores: Arix. 6, Nev. 2, N.M. 1)	90.0
Bullock's (Bullock's South, Los Angeles) (2 stores in Ariz.: Chris-Town Center, Phoenix and Scottsdale)	21.0
Capriccio, Scottsdale (1 store)	2.0
Diamond's, Tempe, Arix. (Dayton Hudson, Minneapolis, Minn.) (9 stores: Arix. 7, Nev. 2) (A 10th store was opened in 1980; 11th to be opened in Las Vegas in Spring 1981.)	115.8
Goldwater's, Scottsdale (Associated Dry Goods, New York, N.Y.) (6 stores: Ariz. 5, incl. Fiesta Mall, Mesa, Ariz. store opened Aug. 1979, N.M. (Albuquerque), 1) (A 7th store was opened Aug. 1980 in Paradise Valley Mall, Phoenix)	60.0
Joske's, Phoenix (Joske's of Dallas/Phoenix) (2 stores taken over from Liberty House)	14.0
I. Magnin (I. Magnin, San Francisco, Calif.) (1 store in Biltmore Fashion Center, Phoenix)	3.5
Saks Fifth Avenue (Saks Fifth Avenue, New York) (1 store in Biltmore Fashion Center, Phoenix)	8.0

DEPARTMENT STORE SALES

WEST	Approx. Sales (Millions of $)
ARIZONA (continued)	
Tucson	
Levy's of Tucson (Federated Department Stores, Cincinnati, Ohio) (1 store)	$ 36.7
CALIFORNIA	
Bakersfield	
Malcolm Brock Co. (2 stores in Calif.)	17.0
Carson	
The Boston Stores Inc. (11 stores: Calif. 10, Ariz. 1)	20.0+
Castro Valley	
Daughtery's Dept. Store (3 stores in Calif., plus 2 Budget Shops)	6.0
Chico	
M. Oser & Co. (3 stores in Calif.)	3.5
Eureka	
Daly Bros. (3 stores in Calif.)	4.0
Fresno	
E. Gottschalk & Co. (7 stores in Calif., incl. Fashion Fair, Fresno)	72.1
Glendale	
H. S. Webb & Co. (Webbs Stores Ltd.) (3 stores in Calif.)	8.0
Hayward	
Mervyn's (Dayton Hudson, Minneapolis, Minn.) (60 stores: Ariz. 4, Calif. 50, Nev. 2, N.M. 2, Ore. 1)	656.0
Huntington Park	
Wineman's Dept. Store (4 stores in Calif.)	9.0
Los Angeles/Long Beach Area	
Bonwit Teller, Bevery Hills (Bonwit Teller, New York) (1 store)	9.0
Broadway Southern California, Los Angeles (Carter Hawley Hale, Los Angeles, Calif.) (40 stores in Calif.)	598.0
(Pasadena and Santa Monica stores were opened in the summer of 1980.)	
Buffum's, Long Beach (David Jones Ltd., Australia) (14 specialty and junior department stores in Calif.)	92.0
Bullock's South, Los Angeles (Federated Department Stores, Cincinnati, Ohio) (15 stores: Calif. 13, Ariz. 2. Also operates Bullock's Wilshire)	405.3

(Los Angeles area continued)

WEST	Approx. Sales (Millions of $)
CALIFORNIA	
Los Angeles Area (continued)	
Bullock's South, Los Angeles (continued)	
California stores (13)	$ 334.3
Arizona (Chris-Town Center and Scottsdale)	21.0
Bullock's Wilshire (Bullock's, Los Angeles, Calif.) (5 specialty stores in Calif.)	50.0
(Bullock's opened stores in Mission Viego and Carlsbad, Colo. in 1980.)	
Contempo Casuals, Los Angeles (Carter Hawley Hale, Los Angeles Calif.) (37 specialty stores) (1 stores to be added in 1980-1981.)	25.0
Harris', San Bernardino (4 Calif. stores)	30.0+
Harris & Frank, Los Angeles (Phillips-Van Heusen) (34 stores)	40.0+
Henshey's, Santa Monica (2 Calif. stores)	10.0
Hinshaw's, Whittier (2 Calif. stores)	22.0
Iver's Dept. Store (2 stores)	7.5
Judy's, Van Nuys (47 stores)	30.0
May Co.-California, Los Angeles (May Dept. Stores, St. Louis, Mo.) (29 stores in Calif.)	528.0
Neiman Marcus (Neiman Marcus, Dallas, Texas) (2 branch stores)	
Beverly Hills (opened Feb. 1979)	32.0
Fashion Island, Newport Beach	12.0+
Nordstrom South Coast, Costa Mesa (Nordstrom's, Seattle, Wash.) (2 stores)	40.0+
Roberts Dept. Stores, Los Angeles (11 stores in Calif.)	10.0+
J. W. Robinson, Los Angeles (Associated Dry Goods, New York) (18 stores in Calif.)	250.0
(Sherman Oaks, Galleria store opened Sept. 1980. Projected annual volume: $12 million. Santa Monica Place opening, scheduled for Fall 1980, delayed by fire. Del Amo, Torrance, Calif. store to be opened in Aug. 1981.)	
Saks Fifth Avenue (Saks Fifth Avenue, New York) (5 stores in Southern Calif.)	50.0+
Silver Woods, Los Angeles (Hart Schaffner & Marx) (20 stores: Calif. 19, Nev. 1)	25.0
Wineman's Dept. Stores, Huntington Park (4 stores in Calif.)	9.0
Modesto	
C. H. Dunlap (3 specialty stores in Calif.)	10.0
Sacramento	
Weinstock's (Carter Hawley Hale, Los Angeles, Calif.) (9 stores in Calif., 1 in Nev.)	148.0
San Diego	
The Broadway (Broadway Dept. Stores, Los Angeles, Calif.) (5 area stores)	70.0
Fashion Valley	23.0

(San Diego continued)

DEPARTMENT STORE SALES

WEST	Approx. Sales (Millions of $)
CALIFORNIA (continued)	
San Diego (continued)	
John Hogan (2 specialty stores, Fashion Valley & LaJolla) (Also operates a store at Fashion Island, Newport Beach)	$ 4.0
May Co. (The May Co., Los Angeles, Calif.) (4 area stores) (5th store at Bonita opened in 1980)	60.0
J.C. Penney, Fashion Valley store	35.0
Walker-Scott Corp. (12 department and specialty stores in Southern Calif.)	45.2
San Francisco-Oakland Area	
Bullock's North, Menlo Park (Federated Dept. Stores, Cincinnati, Ohio) (5 stores in Calif.)	75 to 80
Capwell's, Oakland (Carter Hawley Hale Stores, Los Angeles) (12 stores in Calif.)	128.0
Emporium, San Francisco (Carter Hawley Hale, Los Angeles) (12 stores in Calif.)	270.0
(Emporium and Capwell stores were combined into one operation, Emporium/Capwell, San Francisco, in Feb. 1980.)	
Grodin's of California (27 specialty stores in Northern California and Nev.)	26.0
Hastings (15 specialty stores)	20.0
Holman's, Pacific Grove (1 store)	6.0
Liberty House of Calif. Oakland (AMFAC, Honolulu, Hawaii) (11 stores in Calif.)	140.0
Livingston Bros., San Francisco (12 specialty stores in Calif.)	20.0
Macy's California, San Francisco (R.H. Macy, New York) (17 stores: Calif. 16, Nev. 1, plus 2 Furniture Clearance Centers)	470.0
I. Magnin, San Francisco, (Federated Dept. Stores, Cincinnati, Ohio) (23 stores: Calif. 18, Ariz. 1, Ore. 1, Wash. 1, Ill. 1, Md. 1)	205.8
Chicago (1 store) (Northbrook Court, 2nd Chicago store, was opened Oct. 1979)	22.0
White Flint, Md. store	9.0
Phoenix, Ariz. store	3.5
Joseph Magnin (41 stores plus Gucci shops. 5 stores, including Denver store, were closed in 1979.)	100.0+
Saks Fifth Avenue (Saks Fifth Avenue, New York) (3 Northern Calif. branch stores)	30.0+
Smith's Oakland, (23 stores: Calif. 22, Nev. 1)	23.0
Sherwood Swan & Co., Oakland (1 store)	5.0
San Luis Obispo	
Riley's Dept. Store (4 Calif. stores)	6.0
San Mateo	
Levy Brothers Dept. Stores (5 stores in Calif.)	8.0

DEPARTMENT STORE SALES

WEST	Approx. Sales (Millions of $)
CALIFORNIA (continued)	
Santa Cruz	
Samuel Leask & Sons (2 stores in Calif.)	$ 5.0
Santa Monica	
H. C. Henshey Co. (2 stores in Calif.)	10.0
Santa Rosa	
Rosenberg's Inc. (Gamble Dept. Stores, Chicago, Ill.) (1 store)	9.0
Sun Valley	
Nahas Enterprises (13 stores in Calif.)	18.5
Vallejo	
Levee's (1 store)	4.0
Watsonville	
Charles Ford & Co. (5 department stores plus 5 specialty stores in Calif.)	13.0+
COLORADO	
Denver	
Denver Dry Goods Co. (Associated Dry Goods, New York) (13 stores: Colo. 12, Mont. 1)	98.7
Fashion Bar (64 apparel specialty stores)	60.0
Joslin Dry Goods (Mercantile Stores, New York, N.Y.) (8 stores: Colo. 6, Calif. 2)	75.0
May D & F (May Department Stores, St. Louis, Mo.) (9 stores in Colo.)	99.3
Joseph Magnin (Joseph Magnin, San Francisco) (1 store, which was closed Sept. 1979)	2 to 3
Neusteters (8 stores in Colo.)	18.0
HAWAII	
Honolulu	
Liberty House (Amfac Inc., Honolulu, Hawaii) (7 department stores & 25 misc. retail operations)	135.0+
Shirokiya Ind., Honolulu (2 stores)	23.0

DEPARTMENT STORE SALES

WEST	Approx. Sales (Millions of $)
IDAHO	
Boisé	
The Mode Ltd. (2 stores in Idaho)	$ 5.0
MONTANA	
Billings	
Hart Albin Co. (2 stores: Mont. 1, Calif. 1)	8.0
Hennessy Co. (Mercantile Stores Co., New York)	10.0
OREGON	
Eugene	
The Broadway (7 stores: Ore. 5, Wash. 2)	6.0
Portland	
Meier & Frank (6 stores: Ore. 5, Wash. 1) (May Department Stores, St. Louis, Mo.)	148.3
UTAH	
Salt Lake City	
Auerbach's (3 stores in Salt Lake City)	30.0
ZCMI Dept. Store (6 stores in Utah)	122.3
WASHINGTON	
Seattle-Everett-Spokane Area (The Northwest)	
Bon Marché-Northwest (The Bon), Seattle (Allied Stores, New York) (27 stores: Idaho 6, Mont. 2, Ore. 2, Utah 2, Wash. 15)	279.0
The Crescent, Spokane (Marshall Field & Co., Chicago, Ill.) (3 stores)	30.0
Frederick & Nelson, Seattle (Marshall Field & Co., Chicago, Ill) (13 stores) (Olympia, Wash. store opened in Spring, 1980; Everett Mall, Fall 1980)	147.0
Jay Jacobs, Seattle (27 specialty stores)	18.0
Klopfensteins Inc., Seattle (7 stores: Wash. 6, Alaska 1)	10.0
Lamonts, Seattle (Pay'n Save Corp., Seattle) (19 stores: Wash. 13, Ore. 1, Id. 3, Alaska 2)	65.0+
Nordstrom, Seattle (16 Nordstrom stores and 6 Place Two stores in Wash., Ore., Mont., Calif., Alaska)	346.3

DEPARTMENT STORE VOLUME LEADERS

The following lists department stores by buying or divisional headquarter locations and the total reported or estimated sales for the year 1979 attributed to each headquarter operation. This includes sales of all stores (limited to department stores, where possible) operated by the listed headquarter operation or division. Not included in the list are national chains, such as Sears, Ward and Penney, promotional chains such as Korvettes, and national chains without divisional buying operations.

STORES WITH SALES OF $100 MILLION & OVER

	Sales Volume (Millions of $)
Macy's New York, New York, N.Y. (R. H. Macy) (15 stores plus furniture clearance centers and auto centers)	$ 664.0
J. L. Hudson, Detroit, Mich. (Dayton Hudson) (16 stores)	652.0
Bamberger's, Newark, N.J. (R. H. Macy) (22 stores)	600.0
Broadway Southern Calif., Los Angeles, Calif. (Carter Hawley Hale) (40 stores)	598.0
Saks Fifth Avenue, New York, N.Y. (Brown & Williamson) (31 stores)	532.0
May Company-California, Los Angeles, Calif. (May Department Stores) (29 stores)	528.0
Bloomingdale's, New York, N.Y. (Federated) (14 stores)	518.2
Abraham & Straus, Brooklyn, New York (Federated) (11 stores)	512.0
Macy's California, San Francisco, Calif. (R. H. Macy) (17 stores)	470.0
Marshall Field, Chicago, Illinois (16 stores)	470.0
Bullock's South (incl. Bullock's Wilshire) Los Angeles, Calif. (Federated) (20 stores)	455.3
Alexander's, Inc. New York, N.Y. (15 stores)	454.0
Foley's, Houston, Texas (Federated) (8 stores)	412.2
Burdine's, Miami, Florida (Federated) (16 stores plus furniture clearance centers)	407.0
Lord & Taylor, New York, N.Y. (Associated Dry Goods) (33 stores)	404.0
Jordan Marsh Co., Boston, Mass. (Allied Stores) (14 stores)	374.0
Dayton's Department Stores, Minneapolis, Minn. (Dayton-Hudson) (12 stores)	357.0

STORES WITH SALES OF $100 MILLION & OVER
(continued)

	Sales Volume (Millions of $)
Rich's, Inc., Atlanta, Georgia (Federated) (15,stores not incl. Richway Discount Stores)	$ 328.8
Wanamaker, Philadelphia, Pa. (Carter Hawley Hale) (16 stores)	328.4
Lazarus, Columbus, Ohio (Federated) (14 stores)	325.4
The Hecht Co., Washington, D.C. (May Department Stores) (20 stores)	325.0
Neiman Marcus, Inc., Dallas, Texas (Carter Hawley Hale) (12 stores plus hotel boutiques)	307.0
Goldblatt Brothers, Inc., Chicago, Ill. (39 stores excluding furniture operations)	306.6
Woodward & Lothrop, Inc., Washington, D.C. (14 stores)	295.2
Famous Barr, St. Louis, Mo. (May Co.) (11 department stores)	257.5
Bon Marche-Northwest, Seattle, Wash. (Allied Stores).(27 stores)	279.0
Emporium-Capwell No. California, San Francisco, Calif. (Carter Hawley Hale) (12 stores)	270.0
Filene's, Boston, Mass. (Federated) (12 stores)	267.7
Gimbel's--New York, N.Y. (Brown & Williamson) (11 stores)	255.0
Kaufmann's, Pittsburgh, Pa. (May Department Stores) (10 stores)	253.7
Maas Bros., Inc., Tampa, Fla. (Allied Stores) (19 stores)	252.0
Carson, Pirie, Scott & Co., Chicago, Ill. (14 stores)	250.0
J.W. Robinson Co., Los Angeles, Calif. (Assoc. Dry Goods) (18 stores)	250.0
Strawbridge & Clothier, Philadephia, Pa. (11 stores not including Clover)	250.0
B. Altman & Co., New York, N.Y. (The Altman Foundation) (6 stores)	243.0
Sanger-Harris, Dallas, Texas (Federated) (11 stores)	240.7
The May Co., Cleveland, Ohio (May Department Stores) (10 stores)	220.0
Shillito's, Cincinnati, Ohio (Federated) (9 stores)	211.6
I. Magnin, San Francisco, Calif. (Federated) (23 stores)	205.8
Joseph Horne Co., Pittsburgh, Pa. (Associated Dry Goods) (13 stores)	187.7

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION & OVER
(continued)

	Sales Volume (Millions of $)
The Higbee Co., Cleveland, Ohio (11 stores in department store division)	$ 185.0
Mays, Brooklyn, New York, (J.W. Mays) (8 stores)	183.0
D. H. Holmes Co., Ltd., New Orleans, La. (13 stores)	176.5
Jordan Marsh-Florida, Miami, Fla. (Allied Stores) (12 stores)	175.0
Elder-Beerman Dept. Stores Div., Dayton, Ohio (Elder-Beerman Stores) (20 stores)	170.0
Wieboldt Stores, Chicago, Illinois (13 stores)	169.7
Thalhimer's, Richmond, Virginia (Carter Hawley Hale) (25 stores incl. N. Carolina and Virginia Divisions)	165.0
Dillard Dept. Stores, Central Div., Ft. Worth, Texas (20 stores)	163.0
Hess's, Inc., Allentown, Pa. (Crown American Corp.) (18 stores)	159.8
Gimbels-Midwest Div., Milwaukee, Wis. (Brown & Williamson) (11 stores)	154.0
P.A. Bergner, Peoria, Illinois (27 stores)	150.0
Jefferson Stores, Miami, Florida (Montgomery Ward) (14 stores)	150.0
Meier & Frank, Portland, Oregon, (May Dept. Stores) (6 stores)	148.3
Weinstock's, Sacramento, Calif. (Carter Hawley Hale) (10 stores)	148.0
Frederick & Nelson, Seattle, Wash. (Marshall Field) (13 stores)	147.7
G. Fox & Co., Hartford, Conn. (May Dept. Stores) (8 stores)	145.0
Davison's, Atlanta, Ga. (R.H. Macy) (11 stores)	142.0
Younker's, Des Moines, Iowa (Equitable of Iowa Cos.) (27 stores)	141.9
Liberty House of California, Oakland, Calif. (Amfac) (11 stores)	140.0
Stix, Baer & Fuller Co., St. Louis, Mo. (Associated Dry Goods) (14 stores)	138.5
Gimbel's-Philadelphia, Phila., Pa. (Brown & Williamson) (10 stores)	135.0
Liberty House-Hawaii, Honolulu, Hawaii (Amfac) (7 stores plus specialty operations)	135.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION & OVER
(continued)

	Sales Volume (Millions of $)
Gimbel's- Pittsburgh, Pittsburgh, Pa. (Brown & Williamson) (6 stores)	$ 133.9
Capwell's-Oakland, Oakland, Calif. (Carter Hawley Hale) (6 stores)	128.0
Miller & Rhoads, Inc., Richmond, Va. (Garfinckel, Brooks Bros., Miller & Rhoads) (21 stores)	125.0
Joske's-Dallas/Phoenix, Dallas, Texas (Allied Stores) (13 stores)	124.0
Rike's, Dayton, Ohio (Federated) (5 stores)	122.9
ZCMI (Zion's Cooperative Mercantile Institution), Salt Lake City, Utah (6 stores)	122.3
The M. O'Neil Co., Akron, Ohio (May Dept. Stores) (9 stores)	121.5
L.S. Ayres & Co., Indianapolis, Ind. (Associated Dry Goods) (12 stores in Department Store Division)	120.0
C.J. Gayfer Co., Mobile, Alabama (Mercantile Stores Co.) (11 stores)	120.0
Joske's-Houston, Houston, Texas (Allied Stores) (8 stores)	120.0
J. Byron's, Miami, Florida (Jack Eckerd Corp.) (38 stores)	118.5
Diamond's, Tempe, Arizona (Dayton-Hudson) (9 stores)	115.8
Dillard's Dept. Stores, Little Rock, Arkansas (13 stores)	115.6
Dillard's Dept. Stores, Texas Div., San Antonio, Texas (12 stores)	112.7
Goldsmith's, Memphis, Tenn. (Federated) (4 stores)	112.1
Stern Brothers, Paramus, N.J. (Allied Stores) (6 stores)	112.0
Boscov'e Department Stores, Reading, Pa. (6 stores)	110.0
Halle Bros. Co., Cleveland, Ohio (Marshall Field) (9 stores)	110.0
Sibley, Lindsay & Curr Co., Rochester, N.Y. (Associated Dry Goods) (9 stores)	110.0
Macy's, Missouri-Kansas Div., Kansas City, Mo. (R.H. Macy) (12 stores)	105.0
Joske Bros., San Antonio, Texas (Allied Stores) (7 stores)	100.0
McAlpin Co., Cincinnati, Ohio (Mercantile Stores) (9 stores)	100.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $50-TO-$100 MILLION

	Sales Volume (Millions of $)
Outlet Dept. Stores, Providence, R.I. (Outlet Co.) (8 stores)	100.0
May D & F, Denver, Colorado (May Dept. Stores) (9 stores)	$ 99.3
Milwaukee Boston Store, Milwaukee, Wis. (Federated) (6 stores)	99.1
Denver Dry Goods, Denver, Colorado (Associated Dry Goods) (13 stores)	98.7
Donaldson's, Minneapolis, Minn. (Allied Stores) (8 stores)	98.0
H.C. Prange, Dept. Store Div., Green Bay, Wis. (18 stores)	95.0
J.L. Brandeis & Sons, Omaha, Neb. (15 stores)	92.0
Buffum's, Long Beach, Calif. (David Jones Ltd.) (14 stores)	92.0
B. Gertz, Plainview, N.Y. (Allied Stores) (7 stores)	92.0
The Broadway-Southwest Div., Mesa, Arizona (Carter Hawley Hale) (9 stores)	90.0
Jones Stores, Kansas City, Mo. (Mercantile Stores) (5 stores)	90.0
Parisian, Inc., Birmingham, Alabama (8 stores)	85.0
Ivey's-Carolinas, Charlotte, N.C. (J.B. Ivey Co.) (13 stores)	80.0
Sakowitz, Inc., Houston, Texas (9 stores)	80.0
William H. Block Co., Indianapolis, Ind. (Allied Stores) (9 stores)	78.2
Bullock's-North, Menlo Park, Calif. (Federated) (5 stores)	78.0
Hutzler's, Baltimore, Maryland (6 stores)	77.3
Strouss, Youngstown, Ohio (May Department Stores) (10 stores)	75.4
Adam, Meldrum & Anderson, Buffalo, N.Y. (9 stores)	75.0
Joslin Dry Goods Co., Denver, Colo. (Mercantile Stores) (8 stores)	75.0
H & S Pogue Co., Cincinnati, Ohio (Associated Dry Goods) (5 stores)	75.0
Stewart & Co., Baltimore, Md. (Associated Dry Goods) (5 stores)	75.0
E. Gottschalk & Co., Fresno, Calif. (7 stores)	72.1
D. M. Read, Inc., Bridgeport, Conn. (Allied Stores) (5 stores)	71.5
Maison Blanche Co., New Orleans, La. (City Stores) (8 stores)	70.0
McRae's, Jackson, Miss. (11 stores)	70.0+

STORES WITH SALES OF $50-TO-$100 MILLION (continued)

	Sales Volume (Millions of $)
Miller's, Inc., Knoxville, Tenn. (Garfinckel, Brooks Bros., Miller & Rhoads) (11 stores)	$ 70.0
Garfinckel's, Washington, D.C. (Garfinckel, Brooks Bros., Miller & Rhoads) (7 stores plus 2 hotel shops)	68.0
Ivey's Florida, Winter Park, Fla. (J.B. Ivey Co.) (10 stores)	67.0
Goudchaux, Inc., Baton Rouge, La. (3 stores)	65.0
Powers Dry Goods, Minneapolis, Minn. (7 stores)	65.0
Frost Bros., San Antonio, Texas (Manhattan Ind.) (6 stores)	60.0+
Community Family Centers, Chicago, Ill. (11 stores)	60.0
Goldwaters, Scottsdale, Ariz. (Associated Dry Goods) (6 stores)	60.0
McCurdy & Co., Inc., Rochester, N.Y. (5 stores)	60.0
Palais Royal of Houston, Houston, Texas (17 stores)	60.0
Pizitz, Inc., Birmingham, Alabama (10 stores)	60.0
Pomeroy's, Inc., Levittown, Pa., (Allied Stores) (8 stores)	60.0
Stewart Dry Goods, Louisville, Ky. (Associated Dry Goods) (7 stores)	60.0
Crowley Milner, Detroit, Michigan (8 stores)	59.4
Hochschild Kohn, Baltimore, Md. (Supermarkets Gen'l.) (8 stores)	59.0
Robinson's of Florida, St. Petersburg, Fla. (Associated Dry Goods) (7 stores)	58.0
Cain-Sloan Co., Nashville, Tenn. (Allied Stores) (4 stores)	56.5
Pomeroy's, Inc., Harrisburg, Pa. (Allied Stores) (6 stores)	55.0
Richards, Miami, Florida (City Stores) (8 stores)	55.0
The Fair, Inc., Beaumont, Texas (23 stores)	50.0
Sage Allen & Co., Hartford, Conn. (13 stores)	50.0
Chas. V. Weise Co., Rockford, Ill. (P.A. Bergner & Co.) (8 stores)	50.0

MAJOR GENERAL MERCHANDISE/APPAREL RETAILERS (CHAINS)
(Listed Alphabetically)

The following companies have major positions in general merchandise/apparel retailing—including the operation of traditional department stores, discount stores, apparel specialty stores and catalog operations. Many of these giants are engaged in non-related activities, such as the operation of supermarkets or of hard goods outlets, manufacturing, wholesaling, as well as such diverse activities as the operation of auto repair shops, of television stations, etc. The sales volumes reported are total net sales covering all operations, unless otherwise noted.

Retail Chain or Corporation	1979/1980 Sales* (Millions of $)
Adam, Meldrum & Anderson, Buffalo, N.Y.	$ 75.0
Alexanders, Inc., New York, N.Y.	454.0
Allied Stores Corp., New York, N.Y.	2,210.3
Almy Stores, Inc., Brighton, Mass.	80.2
B. Altman & Co., New York, N.Y.	243.0
Ames Dept. Stores, Inc., Rocky Hill, Conn.	322.0
Amfac, Inc., Honolulu, Hawaii (Liberty House sales: $257.8 million)	1,689.0
C.R. Anthony & Co., Oklahoma City, Okla.	262.0
Associated Dry Goods Corp., New York, N.Y.	1,783.2
Belk Stores, Charlotte, N.C.	1,125.0
P.A. Bergner & Co., Inc., Peoria, Ill.	149.9
Boscov's, Reading, Pa.	100.0
J.L. Brandeis & Sons, Omaha, Neb.	92.0
Brooks Fashion Stores, Inc., New York, N.Y.	129.1
Brown Group, Inc., St. Louis, Mo.	1,144.9
Buffum's, Long Beach, Calif.	84.8
J. Byron's, Miami, Fla.	118.4
Caldor, Inc., Norwalk, Conn.	562.8
Carson Pirie Scott & Co., Chicago, Ill.	434.3
Carter Hawley Hale Stores, Inc., Los Angeles, Calif.	2,408.0
Charming Shoppes, Inc., Cornwell Hts., Pa.	103.9
Chess King, New York, N.Y.	109.8
City Products Corp. (Household Finance Corp.) Chicago, Ill. (excl. supermarket sales)	2,445.0
City Stores Corp., New York, N.Y.	283.0
Cluett, Peabody & Co., New York, N.Y.	680.2
Cook United, Inc., Maple Hts., Ohio	422.8
Crowley, Milner & Co., Detroit, Mich.	59.4
Danners, Inc. (Three-D), Indianapolis, Ind.	107.7
Dayton Hudson Corp., Minneapolis, Minn. (including Mervyn's, Hayward, Calif. with sales of $656 million.)	3,384.8
Dillard Department Stores, Inc., Little Rock, Ark. (including Fort Worth, Tex., San Antonio, Tex., and Little Rock, Ark. Divisions)	391.3
Dollar General Corp., Scottsville, Ky.	177.8
Duckwall-ALCO Stores, Inc., Abilene, Kansas	172.8
Elder-Beerman Stores Corp., Dayton, Ohio	195.3
Family Dollar Stores, Inc., Charlotte, N.C.	151.8
Federated Department Stores, Inc., Cincinnati, Ohio	5,806.4
Fed-Mart Corp., San Diego, Calif.	975.0

MAJOR GENERAL MERCHANDISE/APPAREL RETAILERS (CHAINS)
(Listed Alphabetically)
(continued)

Retail Chain or Corporation	1979/1980 Sales* (Millions of $)
Fred Meyer, Inc., Portland, Ore.	$ 1,060.2
Gamble-Skogmo, Inc., Minneapolis, Minn. (Gamble Department Stores sales: $60 million)	2,053.0
Gap Stores, Inc., San Bruno, Calif.	306.5
Garfinckel, Brooks Bros., Miller & Rhoads, Inc., Washington, D.C.	420.4
Gaylords National Corp., Secaucus, N.J.	123.2
Genesco Inc., Nashville, (sales of S. H. Kress: $145 million)	992.9
Gimbel Brothers (Brown & Williamson Industries) New York, N.Y. (including Saks Fifth Avenue)	1,189.5
Glosser Bros., Inc., (GeeBee) Johnstown, Pa.	156.9
Goldblatt Bros., Inc., Chicago, Ill. (including Wasson's Dept. Stores and also furniture showrooms and home improvement centers)	306.6
L.S. Good & Co., Wheeling, West Virginia	72.8
E. Gottschalk, Fresno, Calif.	72.1
Hart Schaffner & Marx, Chicago, Ill.	630.7
Hartfield-Zodys, Inc., Los Angeles, Calif.	339.0
Heck's, Inc., Charleston, West Virginia	393.9
Hess's, Inc., Allentown, Pa.	159.0
Higbee Co., Cleveland, Ohio	197.4
D.H. Holmes Co., Ltd., New Orleans, La.	176.5
Hutzler's, Baltimore, Md.	77.3
Interco Inc., St. Louis, Mo. (Sales of P.N. Hirsch: $190.0 million; Eagle Family Stores: $121.3 million)	2,024.3
J.B. Ivey & Co., Charlotte, N.C. (merged with Marshall Field in Oct. 1980)	147.4
Jack Eckerd Corp., Clearwater, Fla.	1,325.1
Jack Winter, Inc., Milwaukee, Wis.	48.0
Jacobson Stores, Inc., Jackson, Mich.	138.1
Jamesway Corp., Secaucus, N.J.	242.4
K mart Corp., Troy, Mich. (incl. Kresge)	12,731.1
King's Department Stores, Inc., New York, N.Y.	572.8
Korvettes (Agache-Willot Group), New York, N.Y. (Store closing underway in 1980)	602.0
Kuhn's-Big K Stores, Nashville, Tenn.	391.7
Lamonts, Seattle, Wash.	65.0
M.H. Lamston, Inc., New York, N.Y.	34.8
Lane Bryant, Inc., New York, N.Y.	381.2
Limited Stores, Inc., Columbus, Ohio	238.0
Loehmann's, Inc., Bronx, N.Y.	140.6
Mack's, Sanford, N.C.	64.5
R.H. Macy & Co., Inc., New York, N.Y.	2,058.0
Joseph Magnin, San Francisco, Calif.	100.0+
Manhattan Industries, Inc., New York, N.Y.	354.2
Marshall Field & Co., Chicago, Ill.	904.3
Masters, Inc., Westbury, New York	85.1

MAJOR GENERAL MERCHANDISE/APPAREL RETAILERS (CHAINS)
(Listed Alphabetically)
(continued)

Retail Chain or Corporation	1979/1980 Sales* (Millions of $)
May Department Stores Co., St. Louis, Mo.	$ 2,956.5
J.W. Mays, Inc., Brooklyn, N.Y.	171.5
McCrory Corp. (Rapid American), New York, N.Y.	593.0
McRae's, Jackson, Miss.	95.0
Melville Corp., Harrison, N.J.	2,022.8
Mercantile Stores Co., Wilmington, Del.	1,067.9
MFY Industries, Inc., Wichita, Kansas	83.1
Miller-Wohl Co., Secaucus, N.J.	184.1
Montgomery Ward (Mobil Oil), Chicago, Ill. (Sales of 21 Jefferson Ward Stores: $247.7 million)	5,251.1
G.C. Murphy Co., McKeesport, Pa.	756.9
New Process Co., Warren, Pa.	226.1
S.E. Nichols, Inc., New York, N.Y.	211.9
Nordstrom, Inc., Seattle, Wash.	346.3
Orhbach's, New York, N.Y.	134.5
The Outlet Department Stores, Providence, R.I. (Sales of Outlet Dept. Stores and Hughes & Hatcher men's wear divisions: $196.0 million. Both are to be sold to United Dept. Stores)	266.3
Pamida, Inc., Omaha, Neb.	333.5
J.C. Penney Co., Inc., New York, N.Y. (Sales of the Treasury Stores: $148 million)	11,274.0
Petrie Stores Corp., Secaucus, N.J.	446.6
Phillips-Van Heusen Corp., New York, N.Y.	380.7
Pomeroys, Harrisburg and Levittown, Pa.	125.0
H.C. Prange Co., Sheboygan, Wis., (incl. Prange-Way Discount Stores)	197.6
Rapid-American (Lerner, McCrory and Britts Divisions), New York, N.Y.	1,369.0
Rockower Brothers, Inc., Huntington Valley, Pa.	104.1
Rose's Stores, Inc., Henderson, N.C.	497.7
Salkin & Linoff, Minneapolis, Minn.	62.3
Schottenstein Stores Corp., Columbus, Ohio	96.9
SCOA Industries, Inc., Columbus, Ohio	880.2
Sears, Roebuck & Co., Inc., Chicago, Ill.	17,514.0
Sprouse-Reitz Co., Inc., Portland, Oregon	136.7
Spurgeon Mercantile Co., Chicago, Ill.	48.8
Sterling Stores Co., Little Rock, Ark.	112.2
Strawbridge & Clothier, Philadelphia, Pa. (Incl. sales of Clover Stores: $115 million)	367.2
Supermarkets General Department Store Division (Howland-Steinbach and Hochschild, Kohn & Co.), Woodbridge, N.J.	159.9
Twin Fair, Inc., West Seneca, N.Y.	233.9
Vornado, Inc., Garfield, N.J.	705.8
Wal-Mart Stores, Inc., Bentonville, Ark.	1,248.2
West Bros., Inc., DeRidder, La.	55.0
Wiebolt Stores, Inc., Chicago, Ill.	169.7
The Wiener Corp., New Orleans, La.	62.4
Winkleman Stores, Inc., Detroit, Mich.	90.3
Winn's Stores, Inc., San Antonio, Tex. (Heinrich, Bauer Verlag)	80.0

MAJOR GENERAL MERCHANDISE/APPAREL RETAILERS (CHAINS)
(Listed Alphabetically)
(continued)

Retail Chain or Corporation	1979/1980 Sales* (Millions of $)
Woodward & Lothrop, Inc., Washington, D.C.	$ 295.2
F.W. Woolworth Co., New York, N.Y. (Sales of Woolco, U.S.: $1,895.0 million)	6,785.0
Younkers, Des Moines, Iowa	141.9
Zayre Corp., Framingham, Mass.	1,549.7
ZCMI (Zion's Co-op. Mercantile Institution), Salt Lake City, Utah	122.3

*Sales figures for companies which publish this information are for the latest fiscal year. The remainder are estimates for the year 1979.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Allied Stores Corp.	New York, N.Y.
Block's (William H. Block Co.)	Indianapolis, Ind.
Bon Marche (The Bon)	Seattle, Wash.
Bonwit Teller (acquired April 1979)	New York, N.Y.
Cain-Sloan	Nashville, Tenn.
Dey Brothers	Syracuse, N.Y.
Donaldson's	Minneapolis, Minn.
Field's (L. H. Field Co.)	Jackson, Mich.
Gertz (B. Gertz, Inc.)	Jamaica, N.Y.
Hardy-Herpolsheimer	Muskegon, Mich.
Heer's	Springfield, Mo.
Herp's Co.	Grand Rapids, Mich.
Jordan Marsh-New England	Boston, Mass.
Jordan Marsh-Florida	Miami, Fla.
Joske's	Dallas, San Antonio and Houston, Tex.
Levy's of Savannah	Savannah, Ga.
Maas Brothers	Tampa, Fla.
Muller's	New York, N.Y.
Plymouth Shops (acquired April 1979)	Lake Charles, La.
Pomeroy's	Harrisburg and Levittown, Pa.
Read's	Bridgeport, Conn.
Stern's	Paramus, N.J.
Troutman's (A. E. Troutman Co.)	Greensburg, Pa.
Wren's (Edward Wren Store)	Springfield, Ohio
Almy Stores, Inc.	Brighton, Mass.
Almy's	Brighton, Mass.
Edgar's	Fall River, Mass.
Edwards	Greece and Pittsford, N.Y.
Freese's	Bangor, Me.
Gorin's	Brighton, Mass.
Star Store	New Bedford, Mass.
Witherille (L. A. Witherill, Inc.)	Brighton, Mass.
Amfac, Inc., Honolulu, Hawaii	Honolulu, Hawaii
Liberty House of California	Oakland, California
Liberty House, Inc.	Honolulu, Hawaii
Associated Dry Goods Corp.	New York, N.Y.
L.S. Ayres & Co.	Indianapolis, Ind.
The Denver Dry Goods Co.	Denver, Colo.
The Diamond	Charleston, West Virginia
Goldwater's	Scottsdale, Ariz.
Hahne & Co.	Newark, N.J.
The William Hengerer Co.	Buffalo, N.Y.
Joseph Horne Co.	Pittsburgh, Pa.
Lord & Taylor	New York, N.Y.
The H. & S. Pogue Co.	Cincinnati, Ohio
Powers Dry Goods Co.	Minneapolis, Minn.

(continued)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

(continued)

Corporations & Retail Divisions	Location of Headquarter Office of Headquarter Store
Associated Dry Goods Corp. (continued)	
J.W. Robinson Co.	Los Angeles, Calif.
Robinson's of Florida	St. Petersburg, Fla.
Sibley, Lindsay & Curr Co.	Rochester, N.Y.
Stewart & Co.	Baltimore, Md.
The Stewart Dry Goods Co.	Louisville, Ky.
Stix, Baer & Fuller	St. Louis, Mo.
Sycamore Specialty Stores	Indianapolis, Ind.
Carter Hawley Hale Stores, Inc.	Los Angeles, Calif.
Bergdorf Goodman Co.	New York, N.Y.
The Broadway--Southern California	Los Angeles, Calif.
Contemp Casuals	Los Angeles, Calif.
Emporium Capwell	San Francisco, Calif.
Neiman-Marcus	Dallas, Texas
Sunset House	Los Angeles, Calif.
Thalhimers	Richmond, Va.
John Wanamaker	Philadelphia, Pa.
Weinstock's	Sacramento, Calif.
City Stores Co.	New York, N.Y.
Loveman's (Loveman, Joseph & Loeb Co.)	Birmingham, Ala.
B. Lowenstein's	Memphis, Tenn.
Maison Blanche Co.	New Orleans, La.
R. H. White	Worcester, Mass.
Cluett, Peabody & Co., Inc.	New York, N.Y.
Boyd's	St. Louis, Mo.
Lytton's	Chicago, Ill.
The Metropolitan Co.	Dayton, Ohio
Young Quinlan	Minneapolis, Minn.
Dayton Hudson Corp.	Minneapolis, Minn.
John A. Brown	Oklahoma City, Okla.
Dayton's	Minneapolis, Minn.
Diamonds	Phoenix, Ariz.
Hudson's (J. L. Hudson Co.)	Detroit, Mich.
Mervyn's	Hayward, Calif.
Federated Department Stores, Inc.	Cincinnati, Ohio
Abraham & Straus	Brooklyn, N.Y.
Bloomingdale's	New York, N.Y.
Boston Store	Milwaukee, Wis.
Bullock's	Los Angeles, Calif.
Bullock's Northern California	Stanford and Palo Alto, Calif.
Burdines	Miami, Fla.
Filene's	Boston, Mass.
Foley's	Houston, Tex.
Goldsmith's	Memphis, Tenn.

(continued)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
Federated Department Stores, Inc. (continued)	
Lazarus	Columbus, Ohio
Levy's	Tucson, Ariz.
I. Magnin	San Francisco, Calif.
Rich's	Atlanta, Ga.
Rike's	Dayton, Ohio
Sanger-Harris	Dallas, Tex.
Shillito's	Cincinnati, Ohio
Gamble-Skogmo, Inc.	Minneapolis, Minn.
Alden's, Inc.	Chicago, Ill.
Gamble Department Stores, Inc.	Chicago, Ill.
J. M. McDonald (McDonalds Dept. Stores)	Hastings, Neb.
Mode O'Day	Burbank, Calif.
Women's World Shops	La Mesa, Calif.
Garfinckel, Brooks Bros., Miller & Rhoads, Inc.	Washington, D.C.
Brooks Bros.	New York, N.Y.
Catherine's Stout Shoppe, Inc.	Memphis, Tenn.
Garfinckel's	Washington, D.C.
Harzfeld's	Kansas City, Mo.
Miller & Rhoads	Richmond, Va.
Miller's, Inc.	Knoxville, Tenn.
Ann Taylor, Inc.	New York, N.Y.
Genesco Inc.	Nashville, Tenn.
Baron's	Miami Beach, Fla.
Henri Bendel (sold in July 1980)	New York, N.Y.
Burkhardt's	Cincinnati, Ohio
M. Gilbert & Sons	South Bend, Ind.
Graves, Cox & Co., Inc.	Lexington, Ky.
Hall-Brown	Nashville, Tenn.
Roos/Atkins (to be sold)	San Francisco, Calif.
Gimbel Brothers (Brown & Williamson Inds.)	New York, N.Y.
Gimbels	New York, N.Y.; Philadelphia and Pittsburgh, Pa.; Milwaukee, Wis.
Saks Fifth Avenue	New York, N.Y.
L. S. Good & Co.	Wheeling, West Virginia
D. M. Christian	Owosso, Mich.
Fowler, Dick & Walker, Inc.	Binghamton, N.Y.; Wilkes Barre, Pa.
The William F. Gable Co.	Altoona, Pa.
Good's Department Stores, Inc.	Wheeling, W. Va.; Steubenville, Ohio
The Hub of Steubenville, Inc.	Steubenville, Ohio

(continued)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
L. S. Good & Co. (continued)	
J. W. Knapp Co.	Lansing and Okemos, Mich.
L. W. Robinson Co.	Battle Creek, Mich.
Smith-Bridgman & Co.	Flint, Mich.
Hart Schaffner & Marx	Chicago, Ill.
J. P. Allen	Atlanta, Ga.
Baskin Clothing Co.	Chicago, Ill.
Ray Beers	Topeka, Kans.
Blackburn's	Amarillo, Tex.
R. J. Boggs, Ltd.	Lawrenceville, N.J.
Capper & Capper, Ltd.	Detroit, Mich. and Chicago, Ill.
deJong's	Evansville, Ind.
Fannin's	Montgomery, Ala.
Field Bros.	New York, N.Y.
Arthur Frank	Salt Lake City, Utah
Frank Bros.	San Antonio, Tex.
Hanny's	Phoenix, Ariz.
Hasting's	San Francisco, Calif.
Jack Henry	Kansas City, Mo.
Heyward-Mahon	Greenville, S.C.
J. O. Jones	Charlotte, N.C.
Kleinhans	Buffalo, N.Y.
Klopfenstein's	Seattle, Wash.
Kucharo's	Des Moines, Iowa
Lang-Vicary	Canton, Ohio
Leopold Price & Rolle	Houston, Tex.
Morris Levy	Savannah, Ga.
Levy/Wolf	Jacksonville, Fla.
Liemandt's	Minneapolis, Minn.
Littler's	Seattle, Wash.
The Man Store	Asheville, N.C.
McLeod Watson/Van Straaten's	Raleigh and Durham, N.C.
Merritt Schaefer & Brown	Autsin, Tex.
Porter-Stevens	New Orleans, La.
Root's	Summit, N.J.
Rosenblatt's	Portland, Ore.
Shulman's	Norfolk, Va.
Silverwoods	Los Angeles, Calif.; Las Vegas, Nev.
Stevens	Jackson, Miss.
Chas. A. Stevens	Chicago, Ill.
F. R. Tripler & Co.	New York, N.Y.
Walkers	Columbus and Dayton, Ohio
Wallachs	New York, N.Y.
Wallachs of Florida	Coral Gables, Fla.
Wicks & Greenman	New Hartford, N.Y.
Jas. K. Wilson/Washer Bros.	Dallas, Tex.
Wolf Bros.	Tampa, Fla.
Wolff's Clothiers	St. Louis, Mo.
A. L. Zachry	Atlanta, Ga.

(continued)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
Interco Incorporated	St. Louis, Mo.
Alberts	Detroit, Mich.
Fine's Men's Shops, Inc.	Norfolk, Va.
Golde's Department Stores	St. Louis, Mo.
P. N. Hirsch	St. Louis, Mo.; New York, N.Y.; Caldwell, Idaho
Standard Sportswear, Inc.	Pittsburgh, Pa.
R. H. Macy & Co., Inc.	New York, N.Y.
Bamberger's	Newark, N.J.
Davison's	Atlanta, Ga.
LaSalle's	Toledo, Ohio
Macy's California	San Francisco, Calif.
Macy's Missouri-Kansas	Kansas City, Mo.
Macy's New York	New York, N.Y.
Manhattan Industries, Inc.	New York, N.Y.
Battlestein's, Inc. (sold in 1980)	Houston, Tex.
Brand Name Fashion Outlet	Glen Rock, N.J.
Frost Bros., Inc.	San Antonio, Tex.
Manhattan Ward, Inc.	Conshohocken, Pa.
Napoleon Nash, Inc.	Oklahoma City, Okla.
The Union Company (sold in principle to Halle's in 1980)	Columbus, Ohio
Marshall Field & Co., Inc.	Chicago, Ill.
John Breuner Co.	San Ramon, Calif.
The Crescent	Spokane, Wash.
Marshall Field & Co.	Chicago, Ill.
Frederick & Nelson	Seattle, Wash.
Halle's	Cleveland, Ohio
The May Department Stores Co.	St. Louis, Mo.
Famous Barr Co.	St. Louis, Mo.
G. Fox & Co.	Hartford, Conn.
The Hecht Co.	Washington, D.C.
Kaufmann's	Pittsburgh, Pa.
May-Cohens	Jacksonville, Fla.
The May Co.	Cleveland, Ohio
May Co. California	Los Angeles and San Diego, Calif.
May-D & F	Denver, Colo.
Meier & Frank Co.	Portland, Ore.
The M. O'Neil Co.	Akron, Ohio
Strouss	Youngstown, Ohio
Melville Corp.	Harrison, N.Y.
Chess King	Worcester, Mass.
Foxmoor	West Bridgewater, Mass.
Marshall, Inc.	Woburn, Mass.

(continued)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
Mercantile Stores Co., Inc.	Wilmington, Del.
Bacon's	Louisville, Ky.
Castner-Knott Co.	Nashville, Tenn.
de Lendrecies	Fargo, N.D.
Gayfer's (Gayfer's/Montgomery Fair)	Montgomery, Ala.
Glass Block (Duluth Glass Block Stores Co.)	Duluth, Minn.
Hennessey's	Billings, Mont.
The Jones Store Co.	Kansas City, Mo.
Joslin's (Joslin's Dry Goods Co.)	Denver, Colo.
Lion	Toledo, Ohio
McAlpin's	Cincinnati, Ohio
The Peoples Store	Tacoma, Wash.
The Root Store Co.	Terre Haute, Ind.
J. B. White	Augusta, Ga.; Columbia and Greenville, S.C.
Outlet Co.	Providence, R.I.
Cherry & Webb	Pawtucket, R.I.
Denby Stores	Pawtucket, R.I.
Hughes & Hatcher	Pawtucket, R.I.
Edward Malley Stores	New Haven, Conn.
Outlet Department Stores	Providence, R.I.
Philipsborn/Flair Stores	Washington, D.C.
Jacob Reed's Sons	Philadelphia, Pa.
Small's	Lansing, Mich.
Touraine Stores	Pawtucket, R.I.
Phillips-Van Heusen Corp.	New York, N.Y.
Blake's	Springfield, Mass.
Hamburger's	Baltimore, Md.
Harris & Frank	Los Angeles, Calif.
Juster's	Minneapolis, Minn.
Kennedy's	Boston, Mass.
Rices Nachmans	Norfolk, Va.
Rapid-American Corp.	New York, N.Y.
Britts Dept. Store Division	New York, N.Y.
Lerner Stores Corp.	New York, N.Y.
McCrory Stores Division	New York, N.Y.
Supermarkets General Corp.	Woodbridge, N.J.
Hochschild, Kohn & Co.	Baltimore, Md.
Howland-Steinbach	White Plains, N.Y.; Asbury Park, N.J.

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CONSUMER MARKET DEVELOPMENTS: Summarizes key economic trends and indicators, particularly those having a direct relationship to the consumer market for durable and nondurable goods. A wide variety of sources are drawn on to present an overview of economic developments and market trends, as well as consumer market dynamics, including trends by age group, educational and income levels, buying patterns and outlook.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity (204 pages, $20.00)

FASHION ACCESSORIES: Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME ELECTRONICS: A statistical summary of the consumer electronics market. Product classifications include home entertainment and related products (television sets, radios, stereos, audio and video systems, video games, etc.), as well as home security and fire protection devices and calculators. Data presented at the manufacturer, retailer, and consumer levels.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS', AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on operating ratios in department and specialty stores, seasonal patterns in advertising, more. Information is also presented on consumer spending and buying preferences.

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MEN'S CLOTHING, TAILORED SPORTSWEAR AND RAINWEAR: Manufacturer level profiled by production, value of shipments, employment, size of firms, more. Imports from key foreign sources by unit and dollar value covered, and data is also presented on retail sales and merchandising.

MEN'S FURNISHINGS AND CAREER/WORK WEAR: Includes information on number of manufacturers, production and shipment figures, geographical distribution, size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, and advertising patterns.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S, WOMEN'S, AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipment, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

MEN'S, WOMEN'S AND CHILDREN'S FOOTWEAR: Findings in a 1980 survey on consumer purchases of footwear are an important new feature of this FACT FILE. Also included are data on major trends in the industry in relation to imports, domestic production and shipments, as well as developments at the retail level.

THE TEXTILE-APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics, as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills. Also: exports and imports. Covers capital expenditures and data on mill machinery.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditure data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES (January 1981): Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR AND DAYWEAR: Data on production and shipments, tracing market shifts in response to fashion changes. Also: imports, retail trends and merchandising ratios, and data on consumer buing habits.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

For orders and further information, please write to:

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SOFT SURFACE FLOOR COVERINGS

Market Trends

The 1980 recession in the U.S. has had a negative effect on the carpet and rug industry. U.S. Census Bureau statistics for the first half of the year show carpet and rug shipments by U.S. manufacturers down 4.6% compared with the first six months of 1979, although the dollar value of shipments rose 1%. Tufted carpets and rugs, which account for 95% of all carpet and rug constructions, were down 5.0% in quantity of shipments.

The housing industry has been one of the hardest hit areas in the recession, and its troubles reflect directly on the carpet and rug industry. Because of high mortgage rates and tight credit restrictions, new housing construction and sales of both old and new homes have suffered. Trade sources indicate that these activities account for approximately 55% of carpet sales. Sales of new one-family homes during July 1980 were estimated at a seasonally adjusted annual rate 14% below July 1979. Housing starts were estimated to be 1.2 million for 1980 versus 1.7 million starts in 1979.

While the industry faced domestic problems, the international market for U.S.-made carpets and rugs continued to grow. The Carpet and Rug Institute (CRI) expects exports to exceed $300 million in value for the first time in 1980, after two consecutive years of 40% growth in shipments value. Mass production techniques which enable U.S. manufacturers to produce carpets and rugs cheaply, the lack of carpet variety overseas and the favorable rate of currency exchange are explanations for the rapid rise in exports.

In the U.S., once the recession is over, carpet and rug manufacturers look for good economic and social conditions to contribute to an estimated 22% increase in carpet and rug shipments through 1984. The steady increase in the number of households in the U.S., combined with the rapid rise of adults in the 25-54 year old age bracket (the prime household-building years), will contribute mightily to the rejuvenation of the industry from its current doldrums.

The commercial contract market also holds promise for the industry in the years to come. While this market held an 18-20% share of the total broadloom market in 1977, the CRI predicts it will hold a 23-25% share by the end of 1980. At the same time, the residential contact market is expected to decline slightly from a 20-22% share in 1977 to 19-21% in 1980. Much of the growth in the commercial contract market will come from new construction, rather than replacement sales.

Meanwhile, the popularity of carpets and rugs for home use continues due to ease of care and maintenance and their solid-resistant, acoustical and energy-saving qualities. Recent surveys indicate that 74% of all living rooms in the U.S. now have wall-to-wall carpeting and only 3% have no carpet or rug in this room.

GENERAL STATISTICS ON THE INDUSTRY

AT THE MANUFACTURER LEVEL

The latest detailed information on the soft surface floor coverings industry at the manufacturer level has been released by the U.S. Bureau of the Census in the 1977 Census of Manufactures. This is the first complete census since 1972.

The soft surface floor coverings industry, as classified into the three SIC groupings below, consisted of 540 companies which operated 592 mills in 1977. The value of industry shipments from these establishments was $4.8 billion in 1977, 51.8% higher than in the 1972 Census of Manufactures. Value added by manufacture amounted to $1.530 billion in 1977, up 42.4% from $1.076 billion in 1972.

Woven Carpets and Rugs (SIC 2271)*

	1977	1972	% Change 1977/1972
Number of companies	71	64	+ 10.9%
Number of establishments**	71	64	+ 10.9
With 20 or more employees	16	18	- 11.1
Total employment (thous.)	2.8	6.5	- 56.9
Production workers (thous.)	2.5	5.6	- 55.4
Payroll (mil. $)	$ 24.8	$ 44.5	- 44.3
Value added by manufacture (mil. $)#	$ 47.1	$ 93.2	- 49.5
Value of shipments (mil. $)##	$138.7	$212.3	- 34.7
Capital expenditures, new (mil. $)	$ 1.1	$ 3.2	- 65.6

Tufted Carpets & Rugs (SIC 2272)*

	1977	1972	% Change 1977/1972
Number of companies	397	333	+ 19.2%
Number of establishments**	449	381	+ 17.8
With 20 or more employees	251	236	+ 6.4
Total employment (thous.)	50.2	50.1	+ 0.2
Production workers (thous.)	39.4	40.3	- 2.2
Payroll (mil. $)	$ 506.5	$ 348.0	+ 45.5
Value added by manufacture (mil. $)#	$1,438.2	$ 926.8	+ 55.2
Value of shipments (mil. $)##	$4,520.7	$2,775.2	+ 62.9
Capital expenditures, new (mil. $)	$ 78.7	$ 67.1	+ 17.3

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Carpets and Rugs, Not Elsewhere Classified
(SIC 2279)*

	1977	1972	% Change 1977/1972
Number of companies	72	79	- 8.9%
Number of establishments**	72	83	- 13.2
With 20 or more employees	18	26	- 30.8
Total employment (thous.)	2.8	3.2	- 12.5
Production workers (thous.)	2.4	2.5	- 4.0
Payroll (mil. $)	$ 25.3	$ 22.7	+ 11.4
Value added by manufacture (mil. $)#	$ 44.8	$ 56.0	- 20.0
Value of shipments (mil. $)##	$115.2	$157.9	- 27.0
Capital expenditures, new (mil. $)	$ 2.6	$ 4.3	- 39.5

na = not available
n.e.c. - not elsewhere classified

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below.

SIC 2271 covers manufacturers primarily engaged in weaving carpets and rugs from any textile yarn. Important products of this industry include Axminster, Wilton, velvet, chenille and similar woven carpets and rugs as well as woven auto and aircraft floor coverings.

SIC 2272 covers manufacturers primarily engaged in tufting carpets and rugs from any textile fiber. Important products of this industry include tufted carpets, rugs, scatter rugs and bathmat sets, except terry woven.

SIC 2279 covers manufacturers who make rugs, carpets, art squares, floor mattings, needle punch carpeting, door mats and mattings from twisted paper, grasses, reeds, coir, sisal, jute or rugs.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, electric energy and contract work from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

##Value of shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry as well as secondary products and miscellaneous receipts. This value should be clearly distinguished from the total value of floor coverings made by all producers, including those classified in other industries. This total product value is shown on page 10.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977, 1972.

LOCATION OF THE INDUSTRY

Georgia was the location of 53.7% of all soft surface floor coverings mills in 1977, according to the 1977 Census of Manufacturers. In the tufted carpet and rug industry, Georgia accounted for 63.5% of all mills and 62.9% of the total value of shipments.

Location of the Soft Surface Floor Coverings Industry, 1977

	No. of Mills		Value of Shipments (Mil. $)	Value Added by Manufacture (Mil. $)
	Total	With 20+ Employees		
Woven carpets & rugs (SIC 2271)*	71	16	$ 138.7	$ 47.1
Leading states:				
Georgia	16	1	**	3.0
South Carolina	11	5	58.0	18.6
Pennsylvania	10	5	**	**
North Carolina	9	2	**	**
Total, leading states	46	13	**	**
Tufted carpets & rugs (SIC 2272)*	449	251	$4,520.7	$1,438.2
Leading states:				
Georgia	285	161	2,844.2	892.3
California	71	37	505.2	162.8
North Carolina	19	5	**	**
Tennessee	11	6	102.3	23.7
South Carolina	10	8	265.8	78.1
Pennsylvania	6	5	166.7	54.5
Total, leading states	402	222	**	**
Carpets & rugs, n.e.c. (SIC 2279)*	72	18	$ 115.2	$ 44.8
Leading states:				
Georgia	17	4	14.3	6.3
North Carolina	12	2	7.3	3.7
Pennsylvania	7	2	**	**
Rhode Island	5	3	**	**
Total, leading states	41	11	**	**

*For definitions of these SIC numbers, see page 3.
**Withheld by the Census Bureau to avoid disclosing operations of individual companies.

Source: U.S. Bureau of the Census
1977 Census of Manufactures
Industry Series MC77-1-22D
Floor Covering Mills.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

The most recent Bureau of Labor Statistics on employment in the floor covering industry reflects the downturn in housing construction and the U.S. economy in general. Employment in the industry as of June 1980 was approximately 52,000, down 15.3% from 61,400 employed in the industry in June, 1979. The number of production workers employed in the industry fell 15.9% in the same period. The average number of hours worked per week by production workers was also down from a year ago. As a result, average weekly earnings declined slightly, despite an increase in the average hourly pay.

Employment & Earnings in the Floor Coverings Industry (SIC 227)*

	Monthly Averages			Annual Averages		
	June 1980(p)	June 1979	% Change 1980/1979	1979	1978	% Change 1979/1978
All employees (thous.)	52.0	61.4	- 15.3%	60.3	60.9	- 1.0%
Production workers (thous.)	42.2	50.3	- 16.1	49.1	49.3	- 0.4
Avg. weekly earnings	$197.10	$199.61	- 1.3	$197.89	$185.15	+ 6.9
Avg. hourly earnings	$ 5.08	$ 4.73	+ 7.4	$ 4.78	$ 4.44	+ 7.7
Avg. weekly hours	38.8	42.2	- 8.1	41.4	41.7	- 0.7
Avg. overtime hours	2.6	4.8	- 45.8	4.4	4.4	--

*For a definition of this SIC number, see page 3.
(p) = preliminary

Source: U.S. Bureau of Labor Statistics
Employment & Earnings
August & September 1980.

CONCENTRATION IN THE INDUSTRY

Number of Floor Coverings Mills
By Employment Size
(Employment as of mid-March, 1977)

	Woven Carpets & Rugs (SIC 2271)*	Carpets & Rugs, n.e.c. (SIC 2279)*
Total mills	71	72
Employment size:		
Under 10 employees	45	45
10 - 49 employees	14	19
50 - 99 employees	6	3
100 or more employees	6	5

(continued)

CONCENTRATION IN THE INDUSTRY

Number of Floor Coverings Mills By Employment Size

(Employment as of mid-March, 1977)
(continued)

	Tufted Carpets & Rugs (SIC 2272)*
Total mills	449
Employment size:	
Under 10 employees	145
10 - 49 employees	124
50 - 249 employees	122
250 - 999 employees	51
1,000 employees or more	7

*For definitions of these SIC numbers, see page 3.
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census
1977 Census of Manufactures
Industry Series MC77-1-22D
Floor Covering Mills.

Employment & Share of Shipments in Large Mills, 1979

	No. of Mills		% of Total Shipments Accounted For By Mills With 100+ Employees
	With 20+ Employees	With 100+ Employees	
Woven carpets & rugs (SIC 2271)*	60	24	82%
Tufted carpets & rugs (SIC 2272)*	245	137	90
Carpets & rugs, n.e.c. (SIC 2279)*	33	7	61

*For definitions of these SIC numbers, see page 3.
n.e.c. = not elsewhere classified

Source: Sales & Marketing Management Magazine
1980 Survey of Industrial Purchasing Power
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CONCENTRATION IN THE INDUSTRY

Over half of all companies engaged primarily in the manufacture of tufted carpets and rugs had shipments valued at $100,000 or more in 1977. The percentage was even higher (65.3%) for firms classified in the carpet and rugs, n.e.c. (not elsewhere classified) industry. Companies with shipments of $100,000 or more accounted for 32.4% of woven carpet and rug manufacturers.

Number of Companies With Shipments of $100,000 or More in 1977

	No. of Companies	No. With Shipments Over $100,000
Woven carpets and rugs (SIC 2271)*	71	23
Tufted carpets and rugs (SIC 2272)*	397	204
Carpets and rugs, n.e.c. (SIC 2279)*	72	47

*For a definition of these SIC numbers, see page 3.
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census
1977 Census of Manufactures
Floor Coverings Mills MC77-1-22D.

MANUFACTURER OPERATING RATIOS

Selected Key Business Ratios for the Tufted Carpet & Rug Industry
(Median Figures)

	Tufted Carpets & Rugs (SIC 2272)*
No. of firms reporting	57
Current assets to current debt (times)	1.52
Net profits on net sales (times)	1.89
Net profits on net worth (percent)	26.63
Net sales to inventory (times)	7.0

*For a definition of these SIC numbers, see page 3.

Source: Dun & Bradstreet, Inc.
Business Economic Division
Key Business Ratios
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MANUFACTURER OPERATIONS

Sales & Profits of Leading Publicly-Held Floor Covering Manufacturers
1978, 1979 Fiscal Years
(Millions of Dollars)

		Total Consolidated				Floor Covering Division			
	Fiscal Yr. Ended	Sales		Operating Profit		% of Sales		% of Operating Profit	
		1979	1978	1979	1978	1979	1978	1979	1978
Armstrong Cork**	12/31/79	$1,341.1	$1,244.1	$170.2	$169.3	54%	57%	54%	65%
Burlington Ind.	9/29/79	2,676.3	2,421.2	192.0	168.3	14*	14*	44*	61*
Collins & Aikman***	3/ 1/80	599.3	576.5	39.6	54.7	na	na	na	na
Dan River	12/29/79	579.2	530.4	57.4	41.2	21*	21*	11*	9*
Fieldcrest Mills	12/31/79	517.7	463.6	54.0	51.3	22	22	na	na
Galaxy Carpet Mills	9/29/79	96.4	90.8	5.4	8.5	100	100	100	100
Keller Industries	7/31/79	179.4	157.4	15.9	18.9	9	10	--	--
C. H. Masland & Sons	12/31/79	166.2	175.5	(1.3)	8.9	81	78	--	#
Mohasco	12/31/79	747.1	712.5	28.0	33.6	21	21	16	23
Monsanto	12/31/79	6,192.6	5,018.7	487.3	626.0	17*	19*	--	--
Salem***	12/29/79	197.7	169.6	11.3	19.5	100	100	100	100
Shaw	6/30/79	178.2	150.6	13.7	10.8	100	100	100	100
Sperry & Hutchinson	12/29/79	821.0	807.1	65.1	63.2	28	27	21*	49*
J. P. Stevens***	11/ 3/79	1,833.1	1,651.4	136.0	113.1	29	34	26	29
West Point Pepperell	8/25/79	1,012.6	885.2	60.8	67.3	32	26	95*	95*

na = not available
() = loss
*Figures are for the particular division of which floor covering is a part.
**Includes resilient floor covering as well as textile floor covering.
***Collins & Aikman: Fiscal 1978 contains 53 weeks.
Salem: Fiscal 1978 contains 48 weeks.
J. P. Stevens: Fiscal 1979 contains 53 weeks.
#Operating profit exceeds total corporate operating profit due to losses in other divisions.

Source: Market Research Department
Fairchild Publications based on
published annual reports.

SHIPMENTS

Total value of rugs, carpets and carpeting shipped by all producers reached $5.1 billion in 1979, a 7.0% increase over the 1978 shipment value of $4.8 billion, according to the Census Bureau. The quantity of goods shipped went up 3.8% to 1.2 billion square yards.

Woven carpets and rugs increased 12.5% in value and 12.1% in quantity, while tufted carpets and rugs rose 7.0% in value and 4.2% in quantity shipped during 1979.

The Carpet and Rug Institute predicts shipments of all carpets and rugs made in the U.S. will increase at a real annual rate of 3.7% through 1984. However, due to current economic conditions, shipments in 1980 are expected to be 2.9% below 1979 levels.

Tufted carpet shipments, which comprised almost 96% of the carpet and rug market in 1979, are expected to rise 23.1% in the next four years, according to the Institute. Woven carpet shipments and all other types of carpet and rug shipments will remain unchanged through 1984, except for small fluctuations.

Forecast for Shipments of the U.S. Carpet & Rug Industry
1980 - 1984
(Millions of square yards)

	1980	1981	1982	1983	1984	% Change 1984/1980
Total carpet and rug shipments	1,184	1,243	1,318	1,383	1,446	+22.1%
Tufted, total	1,133	1,192	1,267	1,332	1,395	+23.1
Woven, total	19	20	20	19	19	--
All other types, total	31	31	31	31	31	--

Source: Carpet and Rug Institute
January 22, 1980.

SHIPMENTS

Quantity & Value of Shipments of Carpet & Rugs By All U.S. Producers, 1978, 1979

	Quantity (Mil. sq. yds.)			Value (Mil. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Rugs, carpets & carpeting, total	1,207.1	1,162.3	+ 3.8%	$5,126.9	$4,790.6	+ 7.0%
Woven carpets & rugs, total	21.3	19.0	+ 12.1	200.3	178.1	+ 12.5
Tufted carpets & rugs, total	1,156.8	1,110.0	+ 4.2	4,805.4	4,492.8	+ 7.0
Scatter rugs, bathmats & sets (rugs 6'x9' and smaller)	80.7	81.1	- 0.5	252.0	247.4	+ 1.9
Roll goods & rugs larger than 6'x9', excl. artificial grass	973.7	947.3	+ 2.8	4,239.3	3,993.6	+ 6.1
Artificial grass for non-athletic surface	30.7	16.1	+ 90.7	70.8	43.2	+ 63.9
Auto & aircraft carpeting	71.6	65.5	+ 9.3	243.3	208.6	+ 16.6
Other carpets & rugs, total	28.0	33.2	- 15.7	93.4	101.6	- 8.1
Knitted	7.6	7.7	- 1.3	40.7	42.5	- 4.2
Needlepunched	14.8	19.3	- 23.3	32.4	33.5	- 3.3
Braided, hooked & other carpets & rugs, n.e.c.	5.5	6.3	- 12.7	20.3	25.6	- 20.7
Carpet tiles (tufted & needle-punched)	1.1	na	--	27.8	18.1	+ 53.6

n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census,
Current Industrial Reports
MQ-22Q(79)-5 Carpet & Rugs.

The Current Industrial Reports series, from which the above table is taken, is based on a representative sample of floor coverings manufacturers.

The census of manufactures, conducted every five years, is a complete count of all manufacturing firms which produce floor coverings and is therefore considered to be more accurate than the CIR.

The table below includes information on the quantity and value of shipments in the floor coverings industry by all U.S. producers, not just those classified in the industry, as covered in the 1977 census reports compared with the previous census in 1972.

SHIPMENTS

Quantity and Value of Shipments
By All Producers, 1972, 1977

	Quantity (Mil. sq. yds.)			Value (Mil. $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Woven carpets and rugs	19.1*	28.7	- 33.4%	$ 167.9	$ 202.5	- 17.1%
Tufted carpets and rugs	1,039.5**	875.7	+ 18.7	4,172.2	2,634.1	+ 58.4
Carpets and rugs, n.e.c.	34.7*	68.5	- 49.3	93.0	105.8	- 12.1

*Indicates 20-29 percent of this figure has been estimated by the Census Bureau.
**Indicates 10-19 percent of this figure has been estimated by the Census Bureau.
n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census
1977 Census of Manufactures
Floor Covering Mills MC77-1-22D.

MATERIALS CONSUMED IN PRODUCTION OF FLOOR COVERINGS

The consumption of face yarns by all producers in the manufacture of carpets and rugs rose 2.5% in 1979 to 1.8 billion pounds. Nylon fibers, both filament and spun, accounted for 80.6% of the face yarn used in production and was solely responsible for the overall gain in face yarn consumption. All other types of face yarn fiber declined in use from 1978 to 1979. The biggest drop was sustained by acrylic and modacrylic fibers, which declined 24.6% from 1978 levels.

The amount of materials used as secondary backing in carpets and rugs rose 5.8% in 1979 to 982.6 million square yards. Jute was the principal fiber used as a secondary backing. Man-made fibers, both woven and nonwoven, more than tripled in use from 1978 to 1979. Manufacturers used 92.8 million square yards of this fiber in 1979 but only 21.9 million square yards had been used the year before.

MATERIALS CONSUMED IN PRODUCTION OF FLOOR COVERINGS

Materials Consumed in the Soft Surface Floor Coverings Industry, 1979

	Total	Woven	Bathmats & Throw Rugs 6'x9' & Smaller	Tufted roll goods & rugs larger than 6'x9'	Auto & Aero	Other Carpets & Rugs
Face yarns, total (mil.lbs.)	1,762.1	44.9	94.4	1,528.9	53.5	40.4
Wool & chiefly wool	13.5	4.9	(D)	8.2	--	(D)
Nylon, filament	678.2	28.2	13.5	624.7	(D)	9.3
Nylon, spun	743.1		36.4	667.1	29.7	
Acrylic & modacrylic	53.8	9.0	(D)	35.4	(D)	5.9
Polyester	165.6	(D)	30.9	128.8	4.0	1.4
Polypropylene	87.4	(D)	1.3	55.6	(D)	21.5
All other yarns	20.5	(D)	(D)	9.1	(D)	(D)
Primary backing, total (mil. sq. yds.)	--	33.2	70.5	1,019.6	62.1	18.3
Cotton	--	2.1	(D)	85.0	--	(D)
Jute	--	15.4	(D)		37.7	(D)
Man-made & other	--	15.8	64.9	934.6	24.4	15.5
Secondary backing, total (mil. sq. yds.)	982.6	(D)	76.1	1,084.3	20.9	(D)
Jute	593.9	(D)	(D)	583.3	(D)	--
Man-made, woven & nonwoven	92.8	--	--	92.8	--	--
Cushion backing	219.9	2.8	33.8	176.2	(D)	(D)
Foam or high sponge	195.9	(D)	26.0	162.7	(D)	(D)
Other (polyurethane, etc.)	24.1	(D)	7.8	13.5	(D)	(D)
Other (scrim, nonwoven, solid vinyl, etc.)	75.9	(D)	(D)	55.7	(D)	(D)

(D) = Withheld to avoid disclosing figures for individual companies.

Source: U.S. Bureau of the Census,
Current Industrial Reports
Carpet & Rugs MQ-22Q (79).

MATERIALS CONSUMED IN PRODUCTION OF FLOOR COVERINGS

Fiber Consumption in Carpets & Rugs, 1977, 1978
(Millions of Pounds)

	1978	1977
Face yarns		
Total fiber	1,927.7	1,787.3
Man-made fiber, total	1,912.5	1,777.6
Rayon + Acetate		
Yarn	--	**
Staple	--	1.0
Other		
Yarn	747.7	672.3
Staple	1,164.8	1,099.3
Cotton	2.0	1.9
Wool	13.2	12.8
Backing*		
Total fiber	227.5	205.3
Man-made fiber, total	223.7	201.7
Rayon + Acetate		
Yarn	--	**
Staple	--	--
Other		
Yarn	210.9	194.5
Staple	12.8	7.2
Cotton	3.8	3.6
Wool	--	--

*Does not include jute used as woven primary and secondary backing or wool, hair and jute used in carpet and rug pads and cushions.
**Less than 50,000 pounds used.

Source: Textile Economics Bureau,
"Textile Organon," November 1979.

PRODUCER PRICE TRENDS

In the first eight months of 1980, the Producer Price Index for all floor coverings has risen 9.0% over the 1979 annual average after rising only 4.4% last year compared to 1978. The Index for soft surface floor coverings has increased 8.1% so far in 1980. From 1978 to 1979, it increased only 3.0%.

PRODUCER PRICE TRENDS

Producer Price Index for Floor Coverings
(1967 = 100 unless otherwise noted)

	Jan.-August 1980	Annual Averages 1979	Annual Averages 1978	% Change 8 Mo. 1980/1979	% Change 1979/1978
Floor coverings	161.2	147.9	141.6	+ 9.0%	+ 4.4%
Soft surface floor coverings	140.5	130.0	126.2	+ 8.1	+ 3.0
Tufted broadloom, polyester*	--	117.5	114.8	--	+ 2.3
Tufted broadloom, nylon	--	na	109.0	--	--
Tufted broadloom, acrylic	--	132.5	125.6	--	+ 5.5

*Dec. 1968 = 100

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports

The value of imports of carpets and rugs rose 29.1% in 1979 over 1978. Pile hand-inserted or knotted rugs represented 56% of the 1979 total, gaining almost 52% compared with 1978, when this type represented 49% of reported imports in terms of value.

FOREIGN TRADE

Imports

Imports of Carpets & Rugs by Leading Countries of Origin, 1978, 1979

	Quantity (Thous. Sq. Ft.)			Value* (Thous. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Floor coverings, total	168,111.9	na	--	$277,315	$214,853	+ 29.1%
Pile hand inserted or knotted during weaving or knitting, total	18,773.9	15,653.1	+ 19.9%	154,299	101,652	+ 51.8
India	7,323.5	7,283.8	+ 0.5	36,398	30,768	+ 18.3
Iran	4,103.5	3,101.2	+ 32.3	57,628	32,267	+ 78.6
Pakistan	2,993.3	2,051.6	+ 45.9	24,730	14,171	+ 74.5
Over 50% wool pile or tufted inserted in pre-existing base, not over 40 cents per square foot, total	406.1	48.8	+842.8	77	15	+413.3
Over 50% wool pile or tufted inserted in pre-existing base, over 40 cents per square foot, total	3,544.5	3,508.6	+ 1.0	9,308	7,805	+ 19.3
Mainland China	605.6	458.5	+ 32.1	1,695	1,147	+ 47.8
England	534.3	966.1	- 44.7	1,220	1,025	+ 19.0
Greece	510.1	250.0	+104.0	682	333	+104.8
Hong Kong	350.2	329.7	+ 6.2	1,878	1,617	+ 16.1
Pile or tufts inserted and knotted by hand, n.s.p.f., total	22,808.6	14,105.6	+ 61.7	6,248	5,668	+ 10.2
Canada	20,915.1	11,440.3	+ 82.8	3,353	2,025	+ 65.6
Netherlands	617.8	497.5	+ 35.0	523	386	+ 35.5
Japan	514.9	1,679.0	- 69.3	1,083	2,507	- 56.8
Cotton, pile inserted or knotted during weaving or knitting, not by hand, total	5,378.7	6,960.3	- 22.7	3,368	4,151	- 18.9
Belgium	3,593.9	4,481.6	- 19.8	2,345	2,961	- 20.8
Brazil	1,647.4	1,796.4	- 8.3	919	632	+ 45.4
Coir, pile inserted or knotted during weaving or knitting, not by hand, total	3,953.4	4,032.4	- 2.0	2,533	2,316	+ 9.4
India	3,777.2	3,829.2	- 1.4	2,268	2,011	+ 12.8
Textile materials except cotton, pile inserted or knitted during weaving or knitting, not by hand, n.s.p.f., total	72,036.5	70,283.9	+ 2.5	76,292	63,672	+ 19.8
Canada	32,262.1	33,722.9	- 4.3	5,483	3,397	+ 61.4
Belgium	17,019.9	16,137.4	+ 5.5	28,808	24,862	+ 15.9
England	11,812.4	11,973.1	- 1.3	22,340	20,408	+ 9.5

(continued)

Imports

Imports of Carpets & Rugs by Leading Countries of Origin, 1978, 1979
(continued)

	Quantity (Thous. Sq. Ft.)			Value* (Thous. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Braids, except tubular braid with a core, textile materials, n.s.p.f., total	706.5	644.1	+ 9.7%	$ 531	$ 427	+ 24.4%
Japan	396.8	434.7	- 8.7	367	310	+ 18.4
India	166.7	na	--	83	na	--
Over 50% wool of braids, cords & fabric strips, excl. of any core, n.s.p.f., total	30.0	65.1	- 53.9	12	38	- 68.4
Wool, braids, cords & fabric strips, n.s.p.f., total	0.7	4.5	- 84.4	10	6	+ 66.7
Man-made fibers, braids, cords & fabric strips, n.s.p.f., total	12,788.4	22,876.4	- 44.1	5,372	8,910	- 39.7
Japan	12,616.3	22,753.2	- 44.5	5,306	8,861	- 40.1
Textile materials, braids, cords & fabric strips, n.s.p.f. total	1,292.5	1,411.2	- 8.4	420	491	- 14.5
Philippine Republic	823.1	903.5	- 8.9	180	206	- 12.6
India	212.7	244.5	- 13.0	129	132	- 2.3
Wool, woven, not made on a power-driven loom, n.s.p.f., total	2,450.6	2,750.6	- 10.9	6,001	7,054	- 14.9
India	1,254.6	1,204.7	+ 4.1	2,626	2,508	+ 4.7
Afghanistan	160.3	149.9	+ 6.9	382	332	+ 15.1
Federal Republic of Germany	143.5	414.0	- 65.3	230	733	- 68.6
Iran	90.9	146.8	- 38.1	414	1,190	- 65.2
Wool, n.s.p.f., total	848.2	742.7	+ 14.2	1,441	1,499	- 3.9
Canada	278.7	173.9	+ 60.3	292	335	- 12.8
Denmark	160.6	na	--	165	na	--
Spain	145.2	46.0	+215.6	101	74	+ 36.5
Portugal	44.5	59.7	- 25.5	447	146	+206.2
Textile materials except wool, n.s.p.f., total	23,039.3	na	--	11,403	11,149	+ 2.3
India	9,782.0	na	--	2,973	3,126	- 4.9
Ireland	3,606.6	na	--	2,219	1,685	+ 31.7
Netherlands	3,494.6	na	--	2,679	2,519	+ 6.3

na = not available
n.s.p.f. = not specially provided for
*The value of imports is the C.I.F. (cost, insurance, freight) value, which is based on the purchase price and includes freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census
FT 135 U.S. General Imports
December 1979, 1978.

FOREIGN TRADE

Exports

Exports of soft surface floor coverings reached a value of $207.2 million (f.a.s.) in 1979, considerably higher (by 50.7%) than the 1978 export value of $137.5 million. The quantity of carpets and rugs exported equaled 45.5 million square yards, a 38.9% jump from 1978. Tufted carpets and rugs of noncellulosic fibers had an export value of $89.5 million, exactly double their 1978 value while the quantity exported rose 94.3%, to 19.8 million square yards.

The $207 million export value allowed the U.S. to narrow the balance of trade deficit in regards to soft surface floor coverings to minus $70.1 million. In 1978, this deficit was minus $77.4 million.

Exports of Carpets & Rugs by Leading Countries of Importation, 1978, 1979

	Quantity (Thous. Sq. Yds.)			Value* (Thous. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Floor coverings, total exports	45,531.3	32,780.3	+ 38.9%	$207,208	$137,483	+ 50.7%
Tufted, of cotton, total	1,050.9	1,193.5	- 11.9	4,586	4,217	+ 8.7
Australia	187.5	101.6	+ 84.5	1,036	511	+102.7
Canada**	184.8	291.6	- 36.6	580	870	- 33.3
Switzerland	109.5	10.3	+963.1	304	108	+181.4
Tufted, of cellulosic fibers, total	1,919.0	1,668.6	+ 15.0	7,315	6,609	+ 10.7
Canada**	1,478.0	1,339.4	+ 10.3	5,139	5,036	+ 2.0
Japan	107.8	55.9	+ 92.8	546	207	+163.8
Tufted, of noncellulosic fibers, total	19,833.1	10,206.1	+ 94.3	89.488	44,739	+100.0
England	4,578.8	955.3	+379.3	22,883	4,214	+443.0
Saudi Arabia	3,690.2	1,692.1	+118.1	17,545	7,368	+138.1
Tufted, other textile materials, except cotton & man-made fibers, n.s.p.f., total	10,085.8	7,586.8	+ 32.9	49,260	34,639	+ 42.2
Saudi Arabia	2,061.6	1,521.4	+ 35.5	11,620	7,497	+ 55.0
Australia	1,962.5	1,696.6	+ 15.7	8,096	5,818	+ 39.1
Canada**	1,172.1	1,621.9	- 27.7	5,312	7,132	- 25.5
Machine woven, of wool, total	219.0	244.5	- 10.4	3,502	2,636	+ 32.9
Federal Republic of Germany	73.0	37.7	+ 93.6	1,603	708	+126.4
Switzerland	35.7	11.1	+221.6	773	361	+114.1
Machine woven, of man-made fibers, total	4,661.7	3,764.3	+ 23.8	25,424	17,779	+ 43.0
Sweden	838.6	553.9	+ 51.4	3,335	1,969	+ 69.4
Saudi Arabia	689.0	390.5	+ 76.4	5,301	2,440	+117.2
Belgium	553.8	216.3	+156.0	1,737	784	+121.6

(continued)

FOREIGN TRADE

Exports

Exports of Carpets & Rugs by Leading Countries of Importation, 1978, 1979 (continued)

	Quantity (Thous. Sq. Yds.)			Value* (Thous. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Machine woven, of other textile materials, except wool and man-made fibers, total	1,300.4	1,182.8	+ 9.9%	$ 7,023	$ 5,804	+ 21.0%
Canada**	289.7	258.0	+ 12.3	1,169	1,038	+ 12.6
Saudi Arabia	138.0	294.4	- 53.1	964	1,079	- 10.7
Federal Republic of Germany	111.4	64.5	+ 72.7	590	460	+ 28.3
Needlepunched, of man-made fibers, total	521.6	630.9	- 17.3	1,483	1,933	- 23.3
Canada**	250.6	348.7	- 28.1	672	1,210	- 44.5
Australia	221.3	211.4	+ 4.7	552	465	+ 18.7
Other floor coverings, including braided & knitted, of man-made fibers, excluding needlepunched, total	606.3	1,054.2	- 42.5	2,724	4,737	- 42.5
Canada**	104.1	234.5	- 55.6	400	965	- 58.5
Mexico	58.6	36.5	+ 60.5	226	164	+ 37.8
Other floor coverings, including braided & knitted, of other textile materials, except man-made, total	3,078.5	3,934.7	- 21.8	12,476	17,508	- 28.7
Canada**	962.2	1,491.7	- 35.5	2,522	3,701	- 31.9
England	443.0	208.5	+112.5	2,237	1,107	+102.1
Ireland	271.4	na	--	223	na	--
Federal Republic of Germany	217.6	289.9	- 44.2	2,154	4,999	- 56.9
Floor covering underlays of textile materials, total	2,255.0	1,313.9	+ 71.6	3,927	2,367	+ 65.9
England	828.4	247.1	+235.2	1,020	365	+179.4
Canada**	266.3	374.4	- 28.8	466	753	- 38.1
Federal Republic of Germany	216.2	39.2	+451.5	460	118	+289.8

*The value of exports is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of export. It is based upon the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier.

**The quantity and value of exports to Canada have been estimated by the Census Bureau on a 10% sample of shipments valued between $501-$1,999 (approximately 3% of Canadian exports).

n.s.p.f. = not specially provided for

na = not available

Source: U.S. Bureau of the Census
FT 410 U.S. General Exports
December 1979, 1978.

DISTRIBUTORS

According to responses from 109 members of the National Association of Floor Covering Distributors (NAFCD), distributors averaged a modest 3.4% sales increase in the first half of 1980, compared to the first half of 1979. During this six month period, profits barely rose, (averaging +0.3%) compared to a year ago.

The survey participants were not optimistic for the second half of 1980. As a whole, they expected sales to be even with the last half of 1979, but expected profits to fall an average of 3.5% in comparison to 1979. Distributors in five regions of the country anticipated an improvement in sales over 1979, but these gains were offset by the anticipation of sales declines of 5.5% in the East North Central region and 5.8% in the West North Central region. Only distributors in the West expect profits to rise above what they were in the second half of 1979.

Floor Coverings Distributors Sales Performance
First Half 1980/First Half 1979

	Average Percent Change In: Sales	Profits
Total U.S.	+ 3.4%	+ 0.3%
Northeast	+12.1	+ 9.8
South Atlantic	+ 2.7	+ 0.5
East North Central	+ 2.7	+ 7.1
South Central	+ 6.9	- 3.1
West North Central	+ 1.3	-11.8
Mountain	- 3.1	- 4.6
West (includes Hawaii)	+ 1.0	+ 3.9
No identifiable region	+ 4.8	- 2.0

In 1979, the NAFCD undertook a survey to obtain a composite profile of its members. The survey results were issued in September 1979 based on 152 respondents. Some of the results were as follows:

*The average floor covering distributor has been in business 23.5 years and employs 38 people.

*Carpets account for 40.9% of total sales for these distributors. Resilient sheet goods are responsible for an additional 17.5% of sales. Cushion/padding sales equal 9.4% of the total, while rugs account for 2.2%.

*Average inventory turnover is approximately 5 times yearly.

*By 47.5% to 45.6%, a slightly higher percentage of distributors sell more private label carpeting than manufacturer branded carpet.

*Carpets are carried by 90.1% of the floor covering distributors surveyed. Cushion/padding were carried by 87.5%. Only 16.4% carried rugs.

*Almost half of the average sales are to carpet specialty stores. The percentage of distributor sales accounted for by various types of customers is noted in the following table.

(continued)

DISTRIBUTORS

	Average Percent of Sales
Carpet specialty stores	48.7%
Furniture stores	10.1
Home centers/home improvement stores	12.8
Installers	10.4
Paint & wallpaper stores	5.8
Contract designers/specifiers	5.8
Department stores	3.2
Mass merchandisers	3.2
Total	100.0%

THE CONTRACT MARKET

Sales of carpets and rugs for the carpet contract market represent a large percentage of total volume accounting for an estimated 45% to 50% of total industry shipments on a square yard basis. Trade sources expect total sales for the carpet contract market to reach $2.8 billion by 1980, and with an annual replacement rate of 13%, the contract market represents a viable marketing opportunity for carpet manufacturers and distributors. These projections, however, are closely allied to the growth of the total floor coverings industry.

Carpets ease-care maintenance, its acoustical and insulating qualities, its appearance and comfort are gaining increasing acceptance and widespread recognition by a growing number of architects, contractors and purchasing agents in addition to builders buying for both single and multi-family dwellings. As a result, carpet is being used more frequently in schools, offices and hospitals as well as in hotels, motels, theaters and restaurants.

The residential carpet contract market is currently the largest segment of the contract market. This is due in part to the demand by housing developers for a quality broadloom sold on a contractual basis which acts as an incentive for new home buyers. The commercial contract market is also doing well and is expected to reach in excess of $1.5 billion in sales by 1980, surpassing the residential contract market.

The market for contract carpet, according to a consensus among mills and contract dealers is distributed as follows:

Category	% of Market
Hotels, motels	17.0%
Stores, restaurants	24.5
Office buildings	13.8
Activity buildings, airports, theaters	18.1
Schools	18.1
Hospitals	8.5
Total	100.0%

It must also be noted that because residential carpet grades are frequently sold at the retail level for non-residential uses while carpet grades developed for commercial purposes are also sold for use in the home, an accurate measure of the amount of carpeting going into the carpet contract market is difficult to determine.

CONTRACT MARKET

The potential for future growth in the contract market is bright due in part to the amount of new non-residential structures being erected in the United States. As shown in the accompanying table, the value of new non-residential buildings put in place in 1979 was 19.9% higher than the value of similar structures erected in 1978.

New Construction in Place in the United States:
Non-Residential Buildings, 1978, 1979
(Millions of Dollars)

	1979		1978	
	Value	% of Total	Value	% of Total
Private & public construction, total	$60,546	100.0%	$50,476	100.0%
Private construction, total	46,005	76.0	36,293	71.9
Industrial	14,423		10,994	
Office buildings	9,196		6,574	
Other commercial buildings	15,037		11,991	
Religious	1,532		1,248	
Educational	802		729	
Hospital & institutional	3,503		3,347	
Miscellaneous	1,514		1,410	
Public construction, total	14,541	24.0	14,183	28.1
Housing & redevelopment	1,200		1,053	
Industrial	1,409		1,183	
Educational	6,787		6,264	
Hospital	1,649		1,822	
Other public buildings	4,696		4,914	

Source: U.S. Department of Commerce
Construction Review
June, 1980.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

While immediate prospects for the floor covering industry over the next two years are not bright, the long-term trends apparent in the U.S. seem to indicate good times for the industry are just around the corner. For now, the U.S. economy will have an adverse effect on the floor coverings market.

The number of housing starts in the U.S. slumped to 1.7 million in 1979 from a record-shattering 2 million in 1978. After the first six months of 1980, housing starts were at an estimated seasonally adjusted annual rate of only 1.2 million, according to the Census Bureau. The downturn in housing has a delayed effect on the entire home furnishings market, including floor coverings. Because of this, the Carpet & Rug Institute predicts shipments of carpet and rugs will be 3% below 1979 shipment levels.

THE POTENTIAL MARKET

When the recession is over, however, demographic and lifestyle trends in U.S. society point to increased sales for floor coverings. One such trend is the number of new households it is expected will be formed in the next decade. Due to the difficulty in forcasting changes in lifestyles, the Census Bureau has developed four projections of household growth in the 1980's. The most optimistic projection, which assumes a continuance of the current trend toward single person households, projects a 23% increase in the number of households formed in the next ten years. The most pessimistic projection anticipates a 16% growth in the coming decade.

Projected Number of Households 1980-1990
(In Thousands)

	Estimated Total*	1980	1985	1990	% Change 1990/1980
Series A	76,030	80,135	89,705	98,950	+ 23.5%
Series B	76,030	79,870	88,565	96,653	+ 21.0
Series C	76,030	79,704	88,514	96,792	+ 21.4
Series D	76,030	79,349	86,393	92,394	+ 16.4

* Estimated total as of March 1978.

Source: U.S. Bureau of the Census
Current Population Reports
Series P-25, No. 805 (May 1979).

No matter which forecast series is used, persons in the age brackets 35-44 and 45-54 are most likely to be the householder (formerly known as "head of the household"). These two age groups, along with the 25-34 year old age bracket, will grown in numbers faster than the others in the next decade. It has been reported that the 25-44 age group spends 36% more for durable goods than any other age group, and the home furnishings market will particularly benefit from these trends. In addition, with the growing number of two-income households, they present an increasingly affluent market segment.

The attractiveness of floor coverings as potential energy-savers, due to their insulating qualities, is also expected to increase sales among an increasingly energy-and cost-conscious market.

CONSUMER EXPENDITURES

An analysis of National Income & Product Accounts by the Bureau of Economic Analysis, U.S. Department of Commerce, which drew on findings in the 1972 Census of Retail Trade, has yielded data on personal consumption expenditures for soft surface floor coverings and underlays. Based on data on personal consumption expenditures for a broader classification of products reported by the Bureau for 1979, projections on spending for floor coverings have been projected for that year.

The figures reflect retail sales, and do not include the contract or institutional market. The value at retail of the market for soft surface floor coverings is currently estimated at from $6 to $7 billion.

Estimated Personal Consumption Expenditures For Soft Surface Floor Coverings
(In Billions of Dollars)

	1972	Projected 1979
Soft surface floor covers & underlays, total	$ 3.1	$ 6.0
Soft surface floor coverings	2.8	5.5
Cushions & underlays	0.3	0.5

RETAIL SALES BY STORE TYPE

Detailed information on retail sales, analysed by merchandise categories by store type, is compiled every five years by the U.S. Bureau of the Census in a complete census of retail trade. Findings in the most recent census, covering operations in the year 1977, are summarized below.

Combined sales of hard and soft surface floor coverings in retail stores with payrolls amounted to $5.8 million in 1977, according to the U.S. Census Bureau. Of this total, 72.6%, or $4.2 million, was identified as being soft surface floor covering sales. Among the retail outlets for which soft surface sales were broken out, floor covering specialty stores held a 63.0% share of sales although they accounted for only 28.7% of the outlets. Furniture stores, with 39.3% of the stores in this category, produced 15.0% of soft surface volume while department stores were responsible for 19.4% of the reported sales.

Among those stores which do not separately report hard and soft surface floor coverings sales, home improvement centers held the largest share, 7.4% of total sales. General merchandise stores (except department stores) accounted for an additional 2.1% of sales.

RETAIL SALES BY STORE TYPE

Floor Coverings Sales Share by Type of Retail Outlet, 1977
(Stores With Payrolls Only)

	Stores			Sales		
	Number*	% of Total		Thous. $	% of Total	
Floor coverings sales, total	65,697	100.0%		$5,770,333	100.0%	
Soft surface (separately reported)	36,089	54.9	100.0%	4,191,795	72.6	100.0%
Floor coverings stores	10,385	15.8	28.7	2,639,652	45.7	63.0
Department stores**	6,064	9.2	16.8	813,935	14.1	19.4
Furniture stores	14,180	21.4	39.3	628,987	10.9	15.0
Mail order houses	3,563	5.4	9.9	53,764	0.9	1.3
Household appliance stores	679	1.0	1.9	26,779	0.5	0.6
Home textiles stores	883	1.3	2.4	21,573	0.4	0.5
Miscellaneous home furnishings stores	335	0.5	0.9	7,105	0.1	0.2
Hard surface (separately reported)	20,495	31.2	--	941,403	16.3	--
Floor coverings, type not specified	27,008	41.1	--	637,135	11.0	--
Home improvement centers, building material, paint, glass and wallpaper stores, etc.	10,991	16.7	--	427,654	7.4	--
General merchandise stores (except department stores)	11,535	17.6	--	122,421	2.1	--
All other outlets	4,482	6.8	--	87,060	1.5	--

*Each store unit is separately counted, regardless of whether or not it is part of a multi-unit operation.

**Includes all outlets meeting the official Standard Industrial Classification (SIC) definition of a department store, regardless of type of operation (discounter or traditional). This category includes catalog order-desk volume, but not orders entirely by mail through catalog headquarters, which are included in mail order houses.

Source: U.S. Bureau of the Census
1977 Census of Retail Trade
Merchandise Line Sales RC77-L.

RETAIL SALES BY STORE TYPE

Floor Coverings Specialty Stores

There were a total of 17,199 floor coverings stores in operation in 1977, according to the Census Bureau, with total sales of $4.0 billion. Comparable figures are not available in the previous census covering 1972, which limited counts to stores in this category which had payrolls. In 1977, there were 11,195 stores with payrolls, representing a gain of almost 18% compared with the 1972 count, and sales were up 65.2%.

Floor Coverings Stores, 1972, 1977

	All Stores, 1977		Stores With Payrolls					
			No. of Stores			Sales (Mil. $)		
	No. of Stores	Sales (Mil. $)	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Floor coverings stores	17,199	$4,033.0	11,195	9,501	+17.8%	$3,798.0	$2,299.4	+65.2%

Source: U.S. Bureau of the Census
1977 Census of Retail Trade
Establishment & Firm Size RC77-S-1.

Of the total 17,199 floor coverings stores operated in 1977, 14,808 stores were operated for the entire year. Stores with an annual sales volume of $1 million or more, although they accounted for only 4.3% of stores operated the entire year, held 28.8% of the total $3.8 billion in sales.

Number of Floor Coverings Stores by Sales Size, 1977

	Number	Sales (Thous. $)	% of Total	
			No.	Sales
All establishments*	14,808	$3,780,448	100.0%	100.0%
$1 million & over	637	1,088,390	4.3	28.8
$2 million & over	143	425,135	1.0	11.2
$1 million-1,999,000	494	663,255	3.3	17.5
Less than $1 million	14,171	2,692,058	95.7	71.2
$500,000-999,000	1,451	982,500	9.8	26.0
$300,000-499,000	1,851	711,420	12.5	18.8
$100,000-299,000	4,185	772,709	28.3	20.4
Less than $100,000	6,684	225,429	45.1	6.0

*Includes only establishments operated the entire year.

Source: U.S. Bureau of the Census
Establishment & Sales Size
RC77-S-1.

RETAIL SALES BY STORE TYPE

Floor Coverings Specialty Stores

The 1977 census provides information on sales by major merchandise classifications in floor coverings specialty stores. In 1977 there were 11,195 floor coverings stores with payrolls which accounted for sales of $3.8 million. Soft surface floor coverings, which were carried in 92.8% of these outlets, generated sales of $2.6 million, 69.5% of the total. Hard surface floor coverings were sold in 71.1% of the stores and produced sales of $0.7 million. Other large merchandise classifications which contributed over 1.0% of total sales in floor coverings stores were home textiles (2.1%) and furniture and bedding (1.6%).

Sales of Floor Coverings Stores by Major Merchandise Line, 1977
(Stores With Payrolls Only)

	Stores		Sales	
	No. Selling Line*	% of Total	Thous. $	% of Total
Floor coverings store sales, total	11,195	100.0%	$3,798,030	100.0%
Floor coverings	11,195	100.0%	3,387,543	89.2
Soft surface	10,385	92.8	2,639,652	69.5
Hard surface	7,957	71.1	747,891	19.7
Home textiles	2,129	19.0	79,764	2.1
Furniture and bedding	855	7.6	61,732	1.6
Kitchenware and home furnishings	449	4.0	14,469	0.4
Major household appliances	394	3.5	14,952	0.4
Other sales and non-merchandise receipts	--	--	239,570	6.3

*Each store is separately counted, regardless of whether or not it is part of a multi-unit operation.

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade
Merchandise Line Sales RC 77-L.

The annual Management Report of the Retail Floorcoverings Institute (RFI) covers the financial operations of member floor coverings retailers. The 1979 report is an analysis of 196 survey respondents, 149 of whom provided complete financial information on their operations. Soft surface floor coverings account for 71% of sales in these retail outlets.

A composite average for respondents showed carpet sales in 1978 ahead of 1977 sales by 10.8%. Sales per square foot of selling area, at $229, were almost identical to 1977. According to the survey, gross margin per square foot of selling area ($71.45) and net profits per square foot of selling area ($4.21) were both significantly higher average figures than those achieved by carpet departments in either furniture or department stores.

RETAIL SALES BY STORE TYPE

Floor Coverings Specialty Stores

Average Merchandising & Operating Results of Floor Coverings Stores, 1978

	1978
Carpet sales, % change from last year (196)*	+ 10.8%
Net profits to net sales** (149)*	1.8
Net sales per sq. ft. of selling area** (149)*	$229.00
Gross margin per sq. ft. of selling area (149)*	$ 71.45
Net profits per sq. ft. of selling area (149)*	$ 4.21
Inventory investment per sq. ft. of selling area (149)*	$ 19.71
Current assets to current liabilities (times) (149)*	1.59
Ad expenditures (less co-op) as a % of net sales** (196)*	3.23%

*Numbers in parentheses refers to the number of reporting companies in each category.

**Net sales includes carpet installation fees.

Source: Retail Floor Covering Institute
1979 Management Report.

The RFI study also supplied information on residential and contract sales reported by member floor covering stores. Sales to home builders lagged in 1978, rising only 7.6% from 1977 in comparison to an increase of 10.8% in carpet sales storewide. Commercial contract customers spent an average $2,700 per transaction, 153% higher than the average sale in the floor coverings stores surveyed.

Retail Sales Profile of Residential & Contract Customers In Floor Coverings Stores, 1978

	Total Store	Residential/ Retail	Builder Contract	Commercial Contract
Carpet sales, % change from last year	+10.8%	+11.7%	+7.6%	+10.7%
Carpet sales by customer type	100.0	65.9	19.1	15.0
Average no. of sq. yds. per transaction	99.7	52.3	127.5	272.7
Average price per sq. yd., incl. installation	$ 10.84	$ 12.70	$ 9.57	$ 10.01
Average transaction price	$1,080.75	$664.21	$1,220.18	$2,729.73

Among other significant findings in the RFI Management Report, member floor coverings stores reported that 84% of carpet sales were of a branded name and 16% were of private brands. Nearly 78% of these retailers received their carpet supply directly from the mill. Only 22.8% purchased their carpets from distributors. Smaller floor coverings stores were more apt to use distributors than their larger counterparts. Almost 34% of stores with annual sales under $500,000 reported buying carpets from distributors, but only 13.4% of retailers with total sales between $2 million and $5 million said they did so.

RETAIL SALES BY STORE TYPE

Floor Coverings Specialty Stores

Newspapers received an average of 53.4% of advertising expenditures (less co-op) from member stores. Radio placed second in ad dollar allotment with 15.9%, and TV accounted for 11.6% of ad expenditures. The yellow pages and other directories averaged 13.0% of ad expenditures.

When asked to identify their most pressing operating problems, participants pointed to their collection of accounts receivable as the number one problem. Slightly more than 83% mentioned this as either a minor problem or a major problem. Following closely behind as problems to retailers and the percentage of respondents who identified them as such were: managing cash flow (75.5%), obtaining adequate sales increases (73.6%), and the supervision of installers (73.5%).

HFD-Retailing Home Furnishings (January 15, 1979) covered the results of a study on the largest retail floor coverings firms in the U.S. in 1978. Of the 54 retailers listed, all with annual sales volumes of at least $5 million, the top ten companies accounted for 36.4%, or $350.5 million, or the total $703 million. Individual stores in the survey averaged $1.1 million in sales.

Of the total $703 million in sales reported for 1978, stores in the Midwest accounted for 49.9%. Eastern retail outlets surveyed had 25% of total sales, the West had 17.6% of sales, the South, 9.1%, and the Southwest, 7.3%.

The Top Retail Floor Coverings Specialists, 1978

	1978 Sales (Mil. $)	No. of Stores	Avg. Annual Sales Per Outlet* (Mil. $)
1. New York Carpet World Detroit, MI	$74**	65	$1.1
2. Carpetland, USA Munster, IN	70	31	2.3
3. Carpeteria Hollywood, CA	40	37	1.1
4. Allen Carpet Inwood, NY	37**	53	0.7
5. Kaufman Carpet Lodi, NJ	35	42	0.8
6. Miami Rug Co. Miami, FL	20	20	1.0
7. Beckwith-Evans Troy, MI	20	16	1.2
8. Carpet Fair Baltimore, MD	20	18	1.1
9. Abbey Carpet Sacramento, CA	17.5	56	0.3
10. Carpet Town Hollywood, CA	17**	29	0.6

*This figure is derived through the division of sales by the number of existing outlets.

**This figure is an HFD estimate, arrived at either with the assistance of the retailer or through industry sources.

Furniture/Home Furnishings Stores

Furniture stores, according to the 1977 census of retail trade, accounted for 15.0% of total reported sales of soft surface floor coverings handled by retail outlets. The number of furniture stores in operation showed an increase of 5.3% compared with 1972 census findings, and sales were up almost 36%. Furniture stores' total volume in 1979 reached $18.6 billion, 31.9% higher than in 1977.

Furniture Stores: Number of Stores & Total Sales, 1972, 1977-1979

	1979	1978	1977	1972	% Change 1977/1972
Number of stores	na	na	40,801	38,732	+ 5.3%
Total sales (bil. $)	$18.6	$16.2	$14.1	$10.4	35.6

Source: U.S. Bureau of the Census
Revised Monthly Retail Sales & Inventories; 1977 Census of Retail Trade, Establishment & Firm Size

Furniture stores operated the entire year in 1977 produced sales of $13.4 billion. There were 2,762 stores which had annual sales of $1 million or more and they accounted for 43.4% of the total sales amount.

No. of Furniture Stores by Sales Volume, 1977

	No. of Stores		Sales (Mil. $)	
	1977	% of Total	1977	% of Total
Furniture stores*	36,210	100.0%	$13,395.0	100.0%
$1 million & over	2,762	7.6	5,818.3	43.4
$100,000-$999,999	20,187	55.7	7,040.6	52.6
Under $100,000	13,261	36.6	536.2	4.0

*Only includes establishments operated the entire year.

Source: U.S. Bureau of the Census
1977 Census of Retail Trade
Establishment and Firm Size
RC77-S-1.

Soft surface floor coverings were sold in 45.3% of the 31,320 furniture stores with payrolls operating in 1977, and sales amounted to $628,987, or 4.6% of total furniture store volume. Hard surface floor coverings accounted for 0.5% of sales and were carried by 18.2% of the outlets. The following table shows the breakdown of sales by major merchandise line in U.S. furniture stores with payrolls.

RETAIL SALES BY STORE TYPE

Furniture/Home Furnishings Stores

Sales of Furniture Stores by Major Merchandise Line, 1977
(Stores With Payrolls Only)

	Stores		Sales	
	No. Selling Line*	% of Total	Thous. $	% of Total
Furniture store sales, total	31,320	100.0%	$13,623,582	100.0%
Floor coverings	15,014	47.9	703,062	5.2
Soft surface	14,180	45.3	628,987	4.6
Hard surface	5,691	18.2	74,075	0.5
Furniture and bedding	31,320	100.0	10,790,365	79.2
Major household appliances	10,689	34.1	726,031	5.3
Kitchenware and home furnishings	11,085	35.4	380,804	2.8
Televisions	8,191	26.1	376,540	2.8
Home textiles	6,786	21.7	241,400	1.8
Other sales and non-merchandise receipts	--	--	405,380	3.0

*Each store is separately counted, regardless of whether or not it is part of a multi-unit operation.

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade
Merchandise Line Sales RC 77-L.

HFD-Retailing Home Furnishings (April 9, 1979) carried a report on a survey among the top 100 furniture retailers in the country on sales by merchandise classification. A total of 78 retailers responded. Floor coverings accounted for a typical 6.3% of total sales in these stores. A breakdown by sales group show variations ranging from a low of 4.0% of total sales (among the top 25 retailers) to a high of 6.7% of sales (among the 75th to 100th largest retailers).

Average Percent of Total Sales Contributed by Floor Coverings In Furniture Stores, by Size of Store, 1978*

	All Stores	Top 25	26-50	51-75	75-100
Total sales	100.0%	100.0%	100.0%	100.0%	100.0%
Floor coverings	6.3	4.0	4.8	5.7	6.7

*The number of stores in each category who responded are: top 25 (18), 26-50 (17), 51-75 (20) and 76-100 (23).

RETAIL SALES BY STORE TYPE

Furniture/Home Furnishings Store

A study by the National Home Furnishings Association (NHFA) on their members' operating experiences in 1979 showed sales for the typical home furnishings retailer rose 8.7%, which according to the NHFA was about 2% above the inflation rate for the industry.

Almost 10% of total sales in home furnishings stores in the $500,000-$1 million total volume group came from soft surface floor coverings. This group also had the highest median sales to inventory figure (8.90 times) among the four sales groupings.

Soft Surface Floor Coverings Merchandising & Operating Results
In Home Furnishings Stores, 1979
(Median Results)

	% of Sales, Total Store	Gross Margin	Gross Margin Return on Investment	Sales to Inventory (Times)	% of Total Store Inventory
Firms with sales volume of:					
Under $500,000					
Floor coverings	6.78	30.44	1.03	2.44	1.50
All departments	100.0	40.00	1.36	3.43	100,00
$500,000-$1 million					
Floor coverings	9.53	35.26	2.76	8.90	4.74
All departments	100.0	40.70	1.49	3.76	100.00
$1 million-$3 million					
Floor coverings	7.61	34.39	1.59	4.70	4.98
All departments	100.00	41.20	1.70	3.97	100.00
Over $3 million*					
Floor coverings	6.21	35.00	1.89	5.68	6.76
All departments	100.00	41.90	2.05	4.72	100.00

*Does not include the large home furnishing chain stores.

Source: National Home Furnishings Association
1980 Report on Member Store Operating
Experiences in 1979.

Department Stores

Department stores' share of the reported soft surface floor coverings retail market in 1977 amounted to 19.4%, according to the 1977 census of retail trade.

There were a total of 8,807 department stores in operation in 1977 (including discount houses and mass merchandisers meeting the department store definition). This represents an increase of 14% over the 7,742 reported in the 1972 Census. Total sales rose 49% in the five year period, reaching $76.9 million in 1977. Currently annual volume is over the $89 billion rate.

RETAIL SALES BY STORE TYPE

Department Stores

Department Stores: Number of Stores and Total Sales, 1972, 1977-1979

	1979	1978	1977	1972
Number of stores	na	na	8,807	7,742
Sales (bil. $)	$89.1	$81.8	$76.9	$51.5

Source: U.S. Bureau of the Census
Revised Monthly Retail Sales;
1977 Census of Retail Trade
Establishment & Firm Size.

Soft surface floor coverings accounted for 1.1% of total department store sales in 1977 and were sold in 68.8% of these stores, according to the census of retail trade. Soft surface represented 5.8% of total home furnishings sales in department stores. Only 29.5% of department stores carried hard surface floor coverings and their sales accounted for 0.1% of total store volume.

Sales of Home Furnishings in Department Stores
By Major Merchandise Line, 1977
(Stores With Payrolls Only)

	Stores		Sales		
	No. Selling Line*	% of Total	Thous. $	% of Total	% of Home Furn. Sales
Department store sales, total**	8,807	100.0%	$76,909,452	100.0%	
Total dept. store home furnishings sales	8,807	100.0	14,052,544	18.3	100.0%
Floor coverings	6,281	71.4	895,868	1.2	6.4
Soft surface	6,064	68.8	813,935	1.1	5.8
Hard surface	2,598	29.5	81,933	0.1	0.6
Home textiles	8,807	100.0	3,912,809	5.1	27.8
Kitchenware and home furnishings	8,631	98.0	3,470,264	4.5	24.7
Major household appliances	5,861	66.5	3,181,219	4.1	22.6
Furniture and bedding	6,736	76.5	2,598,384	3.4	18.5
All other sales and receipts	8,807	100.0	62,856,908	81.7	

*Each store location is separately counted, regardless of whether or not it is part of a multi-unit operation.

**Includes all outlets meeting the official Standard Industrial Classification (SIC) definition of a department store, regardless of type of operation (discounter or traditional). This category includes catalog order-desk sales, but not orders entirely by mail through catalog headquarters, which are included in mail order houses.

Source: U.S. Bureau of the Census
1977 Census of Retail Trade
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Department Stores

Soft surface floor coverings departmental operating results are compiled annually by the National Retail Merchants Association. Findings for 1979 are summarized below.

Selected Median (Typical) 1979 Merchandising & Operating Results In Department Stores With Total Sales Over $1 Million

	Total Upstairs Store (143)*	Floor Coverings** (92)*	Broadloom (Incl. Paddings) (32)*	Area Rugs (Incl. Room Size) (35)*
Net sales, % change from last year	+5.5%	+2.7	-0,4%	+8.5%
Net sales, % of total store	89.2	1.0	0.8	0.3
Net sales, % of merchandise division	--	11.8	7.8	3.5
$ sales per sq. ft. of selling space (main or largest selling unit)	$91.6	$ 2.5	$75.1	$63.9
Cumulative markon, %	48.0%	41.8%	39.7%	48.9%
Markdowns, % of net retail sales (incl. employee discounts)	13.2	7.1	7.3	7.1
Gross margin, % of net retail sales (incl. cash discounts)	42.2	37.2	36.1	48.6
Number of stock turns (times)	3.1	2.2	3.8	1.4
Sales promotion costs, % of sales	3.0%	3.8%	4.2%	3.6%

*Numbers in parentheses refers to the number of reporting firms in that category.
**Includes both hard and soft surface floor coverings.

Source: National Retail Merchants Association, "Merchandising & Operating Results of 1979," 1980 Edition.

Seasonality in Department Store Sales of Floor Coverings Percent of Year's Sales by Month - Five Year Average

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Home furnishings, total	6.8%	6.8%	7.5%	7.2%	7.0%	7.8%	7.6%	7.9%	8.4%	9.2%	10.3%	12.5%	100.0%
Domestic floor coverings	8.3	7.6	8.2	7.1	7.6	6.4	6.7	7.8	9.3	11.6	11.5	7.9	100.0
Carpets & rugs	7.5	7.9	7.9	7.1	7.5	6.8	6.7	8.2	8.8	11.5	12.3	7.8	100.0

Source: Data are five-year averages computed by the Newspaper Advertising Bureau (1961-1965) (latest available).

RETAIL ADVERTISING

Percent of Years' Total Ad Linage Used Each Month On Broadloom Carpeting, 1979

Month	Broadloom Carpeting
January	7.6%
February	8.0
March	9.0
April	8.5
May	8.4
June	7.8
July	8.2
August	9.0
September	8.8
October	9.9
November	9.2
December	5.6

Source: The Advertising Checking Bureau-Neustatdt Reports Division, covering retail newspaper linage in all newspapers in seven cities: Chicago, Dallas, Cincinnati, Philadelphia, Cleveland, Los Angeles & Washington, D.C.

CONSUMER BUYING HABITS

Data on consumer purchases of specified types of floor coverings, shown on the following pages, have been compiled by the National Panel Diary (NPD) Textile and Apparel Market Index, a specialized service of NPD Research, Inc., of Floral Park, N.Y. Findings are based on reports in an on-going monthly diary survey which tracks purchases reported by a panel of 6,500 nationally-representative U.S. families. (Note that "singles" with their own households are not included). Data shown for families reporting floor coverings purchases are summarized below.

Room-Size Carpets

The NPD panel reported that almost 65% of room-size carpets were purchased at sale price in 1979 in contrast to only 45.8% the previous year.

Percent of Purchases by Store Type

	Units		Dollars	
	1979	1978	1979	1978
Department stores	6.7%	9.1%	4.5%	11.7%
Chains (Sears, Penneys, Wards)	34.9	32.8	32.5	23.4
Discount stores (incl. K-mart)	17.8	18.8	12.5	14.7
All other outlets	34.4	34.8	41.5	45.9
Not reported	6.3	4.6	8.9	4.2

CONSUMER BUYING HABITS

Percent of Purchases by Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1979	4.3%	5.9%	6.3%	10.7%	6.0%	10.8%	12.2%	11.1%	6.1%	10.8%	6.7%	9.1%	100.0%
1978	6.2	12.0	13.1	11.3	6.4	11.1	6.1	7.4	5.2	6.5	8.1	6.8	100.0
Dollars:													
1979	3.8	6.1	7.8	12.8	4.7	11.2	10.9	7.5	7.2	9.7	10.9	7.3	100.0
1978	4.4	14.7	9.8	12.4	5.2	13.7	7.7	6.9	4.6	5.4	7.5	8.0	100.0

Wall-to-Wall Carpeting

Slightly over 54% of wall-to-wall carpeting was purchased at sale price in 1979 while 38% was bought at regular price, according to NPD.

Percent of Purchases by Store Type

	Units		Dollars	
	1979	1978	1979	1978
Department stores	5.5%	7.5%	6.6%	4.9%
Chains (Sears, Penneys, Wards)	6.3	12.3	5.1	12.8
Discount stores (incl. K-mart)	3.9	2.6	1.4	2.6
All other outlets	70.5	65.3	69.7	70.4
Not reported	13.8	12.2	17.3	9.4

Percent of Purchases by Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1979	9.5%	7.7%	8.0%	7.0%	8.8%	7.8%	6.7%	6.8%	6.6%	6.2%	15.7%	9.3%	100.0%
1978	6.4	6.4	9.7	9.6	8.1	7.3	6.4	6.9	12.5	7.9	11.7	7.1	100.0
Dollars:													
1979	4.6	3.6	3.9	3.2	9.4	10.6	7.6	7.5	7.7	7.8	21.7	12.4	100.0
1978	4.4	3.8	6.2	17.1	4.8	10.2	7.5	8.8	19.9	5.3	7.5	4.5	100.0

Area Rugs

In 1979, 51.6% of reported purchases of area rugs were at less than the regular price. This percentage was lower than the 55.9% bought at sale price in 1978. Reported purchases of area rugs at regular price increased to 40.7% compared with 34.3% in 1978.

Percent of Purchases by Store Type

	Units		Dollars	
	1979	1978	1979	1978
Department stores	20.1%	16.4%	31.1%	26.2%
Chains (Sears, Penneys, Wards)	19.7	15.0	26.8	25.5
Discount stores (incl. K-mart)	37.9	33.4	9.5	12.7
Variety stores	6.0	4.7	1.7	2.6
All other outlets	15.1	28.4	27.5	30.6
Not reported	1.4	2.3	3.3	2.3

CONSUMER BUYING HABITS

Area Rugs

Percent of Purchases by Month

Units:	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1979	9.2%	9.9%	12.5%	10.6%	3.3%	8.5%	7.2%	4.2%	7.8%	4.7%	12.6%	9.4%	100.0%
1978	13.5	14.8	8.7	5.5	17.5	5.6	4.9	2.2	5.9	7.3	8.9	5.2	100.0
Dollars:													
1979	3.4	10.7	5.5	11.4	8.8	9.4	5.2	2.2	7.7	4.1	18.9	12.6	100.0
1978	3.8	4.6	6.4	9.0	8.0	12.0	10.0	5.2	6.2	14.3	11.4	9.1	100.0

A panel of 500 women, representative of all Better Homes & Gardens subscribers, were asked various questions about their purchases of carpets and rugs in a 1979 study conducted by Better Homes & Gardens.

Four out of ten panel members said they have purchased carpets or rugs within the past two years. Only 10.2% of these purchasers considered a brand name to be "very important" in their selection, although an additional 49.7% considered a brand name to be "somewhat important."

These purchasers, when asked to indicate the important factors in their buying decision, named the surface appearance and color of a carpet or rug as the most important factor. Other important considerations taken into account prior to purchase were durability, soil resistance/cleanability and price. The least important considerations were identified as the reputation of the manufacturer, anti-static properties of the carpet or rug and the salesman's recommendation.

The type of fiber mentioned most frequently by these carpet/rug purchasers was nylon, which garnered 41.2% of fiber mentions. Acrylic was the next most popular fiber type (31.0% of all mentions).

Type of Fiber Chosen on Carpet/Rug Purchase

	% of Total
Total (187 respondents)*	
Wool	8.0%
Acrylic	31.0
Modacrylic	2.7
Nylon	41.2
Polyester	12.8
Polypropylene olefin	4.8
No answer	5.3

*Total adds to more than 100% due to multiple responses.

Respondents were also asked which factors caused them the most difficulty in deciding on a carpet or rug. Color was a difficult decision for 29.9% of respondents. Knowing how durable a carpet would be was a difficult factor for 25.1% of these purchasers.

CONSUMER BUYING HABITS

Difficult Factors About Choosing Carpets or Rugs

	% of Total
Total (187 respondents)*	
Color	29.9%
Knowing how durable the carpet would be	25.1
Deciding which is the best quality	24.1
Deciding on type (plush, shag, etc.)	21.4
Cost	18.7
Fiber knowledge	15.0
Other	2.7

*Total adds to more than 100% due to multiple responses.

A study conducted in October-November 1979 by Scarborough Research Corp., New York, on behalf of House & Garden magazine sought to develop information on home furnishings purchases by a typical House & Garden subscriber household. From a representative sample of 10,000 House & Garden subscribers, 4,477 readers replied. Carpeting and rugs were purchased by 43% of these respondent households during the year prior to the survey, compared with 13% of all U.S. households.

Department stores were cited as the place of purchase for 31% of respondents who bought carpets or rugs. Furniture stores were selected as the purchase place by 18% of respondents. Another 13% bought their carpets or rugs in discount stores while 41% picked other types of stores (including floor coverings dealers) as the purchase site. (Due to multiple responses, the percentages do not add to 100%.)

Subscriber households who bought carpets or rugs in the past year spent an average of $999 in contrast with the average $432 spent by all U.S. households who bought these items.

Carpet & Rug Expenditures by Price Points

	% of Total
Total respondents purchasing carpets or rugs	100%
Less than $100	10
$100-$500	29
$500-$1,000	19
$1,000-$1,500	16
$1,500 & over	26

In February 1979, members of Seventeen magazine's Consumer Panel were asked about their home furnishings purchases. Questionnaires were received from 1,009 female respondents. Of the 843 respondents with their own room at home, 66.3% had wall-to-wall carpeting, 17.5% had scatter rugs and 12.0% had room size rugs.

(continued)

CONSUMER BUYING HABITS

Over half the girls with rooms at home plan to decorate these rooms in the near future, 40% within the next two years. Nearly 24% of girls expecting to decorate said they would buy wall-to-wall carpeting. Room size rugs were expected to be purchased by 5.5% of the girls and an additional 5.5% will buy scatter rugs.

In the same Seventeen study, engaged girls and those planning to become engaged within a year were asked which home furnishings items they expect to purchase. Of the approximately 157 girls in this category, 43.9% stated they expect to purchase wall-to-wall carpeting.

FAIRCHILD FACT FILES AVAILABLE FOR 1980

CONSUMER MARKET DEVELOPMENTS: Summarizes key economic trends and indicators, particularly those having a direct relationship to the consumer market for durable and nondurable goods. A wide variety of sources are drawn on to present an overview of economic developments and market trends, as well as consumer market dynamics, including trends by age group, educational and income levels, buying patterns and outlook.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (December): Covers the latest available annual sales of department stores throughout the country listed by buying headquarter location. Includes data on number of outlets covered in reported sales totals, as well as information on sales for many branch and main stores. Some leading specialty operations are also included in the listing by location. Other listings: department store operations with sales of $50 million or more reported in order of volume, major conglomerates with general merchandise store or apparel store divisions, and department stores operated by major department store corporations.

FASHION ACCESSORIES: Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME ELECTRONICS: A statistical summary of the consumer electronics market. Product classifications include home entertainment and related products (television sets, radios, stereos, audio and video systems, video games, etc.), as well as home security and fire protection devices and calculators. Data presented at the manufacturer, retailer, and consumer levels.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS', AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on operating ratios in department and specialty stores, seasonal patterns in advertising, more. Information is also presented on consumer spending and buying preferences.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S CLOTHING, TAILORED SPORTSWEAR AND RAINWEAR: Manufacturer level profiled by production, value of shipments, employment, size of firms, more. Imports from key foreign sources by unit and dollar value covered, and data is also presented on retail sales and merchandising.

MEN'S FURNISHINGS AND CAREER/WORK WEAR: Includes information on number of manufacturers, production and shipment figures, geographical distribution, size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, and advertising patterns.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S, WOMEN'S, AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipment, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

MEN'S, WOMEN'S AND CHILDREN'S FOOTWEAR: Findings in a 1980 survey on consumer purchases of footwear are an important new feature of this FACT FILE. Also included are data on major trends in the industry in relation to imports, domestic production and shipments, as well as developments at the retail level.

THE TEXTILE-APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics, as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills. Also: exports and imports. Covers capital expenditures and data on mill machinery.

AR

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditure data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type, and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES (January 1981): Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR AND DAYWEAR: Data on production and shipments, tracing market shifts in response to fashion changes. Also: imports, retail trends and merchandising ratios, and data on consumer buying habits.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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WOMEN'S, MISSES' & JUNIORS' DRESSES

MARKET TRENDS

After a marked upturn in 1978, dress business appeared to dwindle as 1979 progressed, and the recession deepened. Specialty stores fared somewhat better than department stores and misses' and juniors' dresses performed better than women's dress departments.

In the first eight months of 1980, cuttings appeared to be ahead of the figures for the same period of 1979, based on preliminary data which is, however, subject to revision by the U.S. Census Bureau.

Some basic trends favor the continued strengthening of the dress industry in the coming years. One reason is the reemergence of a more traditional customer in the 1980's reflected in an aging population. The number of career women, who require greater formality and variety in their wardrobes, will continue to grow, and many retailers are catering to their special needs with stepped-up promotions, personalized service, realignment of departments, catalogs and the like.

Stores are also putting more emphasis on plus sizes and on petites, to attract customers who have been generally overlooked in dress merchandising plans. Indeed, retailers have become increasingly aware that the dress market has become very segmented, not only in terms of sizes, but in customers' tastes and lifestyles. The American Dress Council is embarking on a program to enlist greater industry-wide cooperation in sponsoring trunk shows, window promotions and newspaper ads to stimulate dress business, and to try to win the jeans customer over to dress departments.

Sportswear manufacturers have seen an opening for themselves in the dress market, and have been having success with items such as T-shirt dresses and shirtwaists which are sold in dress departments, competing primarily in the $40-to-$60 price points.

In general, in the recessionary period that got underway last year, sales of very high priced apparel have held up well, but business in less expensive lines—proving the influence of the downturn on the majority of customers—has been off. In an effort to hold on to this market, many designers are adding lower price point collections to their offerings. Designers in coming years may increasingly maintain their couture lines for image but use lower price lines to keep themselves in business.

Markdowns came earlier in the season in 1979, and stores have been narrowing resources and watching inventories more stringently in view of interest costs. Despite many positive signs for a resurgence in dress business, it will not be easily attained.

In terms of special dress markets, large and petites are the rapidly growing segments of the industry. There are approximately 30 million adult women in the U.S. that wear large or half-size clothing. Dollar volume in plus sizes has doubled from $2 billion in 1974 to over $4 billion in 1978. Plus-sized women spend about 46% of their apparel dollars on dresses at the present time. This figure is expected to increase in the '80's.

(continued)

MARKET TRENDS

The petite customer estimated at between 50 and 65 million women accounted for approximately 27% of the dress business in 1978. This market increased nearly by half a million between 1978 and 1979. With marketing strategy, this segment of the dress market is expected to show strong gains.

GENERAL STATISTICS ON THE INDUSTRY

Every five years the U.S. Bureau of the Census conducts a complete census of all business activities in the U.S. Results of the most recent census of manufactures, covering operations in the year 1977, are now being released, and the following summarizes key findings compared with 1972 census counts. (In interim years, the Census Bureau conducts annual surveys of manufactures, which result in published estimates based on a representative sample of establishments. These estimates may differ from results of a complete canvass of all establishments and are, therefore, not included in the following industry data.)

In 1977 there were a total of 6,953 plants classified in the Women's and Misses' Dress Industry (i.e., plants where the primary product was dresses or pants dresses). The total value of shipments of primary and secondary products, and miscellaneous receipts of these plants amounted to $4,189 million in 1977, an increase of 17% from 1972. The value of dress shipments, alone, amounted to $4,133 million, also gaining 17% compared with the 1972 total.

The Dress Industry—1972, 1977 (SIC 2335)*

	1977	1972	% Change 1977/1972
Number of companies	6,753	5,295	+27.5%
Number of establishments**	6,953	5,567	+24.9
Employees, total (thous.)	175.3	211.6	-17.2
Production workers (thous.)	153.0	186.5	-18.0
Payroll (mil. $)	$1,197.1	$1,076.9	+11.2
Value added by manufacture (mil. $)***	2,233.7	1,888.7	+18.3
Value of shipments (mil. $)#	4,188.6	3,580.0	+17.0
Capital expenditures, new (mil. $)	45.2	32.6	+38.6

nr = not reported

*SIC (Standard Industrial Classification) 2335 covers establishments primarily engaged in manufacturing women's, misses', and juniors' dresses of all types, including ensemble dresses and pants dresses, whether sold by the unit or by the dozen (daytime house dresses).

**Each business location is counted as a separate establishment. For 1977, the 6,953 establishments in the dress industry included 4,347 manufacturers (regular or inside factory), 462 jobbers (who arrange with contractors to manufacture for them, the jobber supplying the material), 2,144 contractors (outside factories which process materials owned by others, and do not sell the finished garment).

(continued)

***Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

#Value of shipments of the dress industry includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in this industry. Figures on shipments of dresses, only, by all producers including those classified in other industries are shown on page 11 under SHIPMENTS.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC 77-1-23B.

Employment & Earnings

Due to differences in reporting procedures, employment data reported by the Bureau of Labor Statistics, U.S. Department of Labor, are not in agreement with figures reported by the Census Bureau, Department of Commerce. The trend in production worker employment and earnings as reported by the BLS in the first eight months of 1980 and in recent years is shown below.

In the first eight months of 1980, average production worker employment in the women's dress industry dropped 2.7% below the average in the same 1979 period. Average weekly earnings, however, were up 8.3% despite a slight drop in average weekly hours worked by production workers.

Employment & Earnings in the Dress Industry

	Jan.-Aug. Average			Annual Average		
	1980	1979	% Change 1980/1979	1979	1978	% Change 1979/1978
Women's, misses' & juniors' dresses (SIC 2335)*						
All employees (thous.)	156.1	161.2	- 3.2%	159.3	164.5	- 3.2%
Production workers (thous.)	138.6	142.5	- 2.7	141.1	144.9	- 2.6
Average weekly earnings	$147.1	$135.8	+ 8.3	$137.14	$131.53	+ 4.3
Average weekly hours	31.8	31.7	- 0.3	31.6	32.8	- 3.7
Average overtime hours	0.7	0.8	-12.5	0.8	1.3	-38.5

*For SIC definition, see page 2.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings.

GENERAL STATISTICS ON THE INDUSTRY

Establishment Size

The dress industry is composed mainly of small plants and a few very large manufacturers. According to the U.S. Bureau of the Census in 1977 there were 6,953 plants (establishments) in the industry, nearly half of which had under 10 employees. Plants with 10 to 49 employees accounted for 38.3% of the total count, while the really large plants, employing 250 or more, held 0.8%.

Of the total 175,300 reported employees, 28.5% were in plants with 20 to 49 employees, and accounted for 28.8% of the total annual payroll of $1.1 billion.

The Women's Dress Industry By Employment Size Class, 1977

	Establishments		Employees		Annual Payroll	
	Number	%	Number	%	Mil. $	%
Total	6,953	100.0%	175,300	100.0%	$1,197.1	100.0%
Employment size class:						
Under 10	3,387	48.7	10,400	5.9	70.8	5.9
10-19	1,093	15.7	15,500	8.8	110.6	9.2
20-49	1,573	22.6	49,900	28.5	344.3	28.8
50-99	586	8.4	39,400	22.5	252.1	21.1
100-249	256	3.7	37,200	21.2	249.1	20.8
250 or more	58	0.8	22,900	13.1	169.3	14.1

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC77-1-23B.

Employment & Share of Dress Shipments in Large Plants, 1977 - 1979

	Number of Plants		% of Total Shipments Accounted for by Plants With 100+ Employees
	With 20+ Employees	With 100+ Employees	
Women's, misses' & juniors' dresses (SIC 2335)*			
1979	1,398	394	63%
1978	1,422	404	65
1977	1,314	418	66

*For SIC definition, see page 2.

Source: Sales & Marketing Management,
Survey of Industrial Buying Power,
1978, 1979, 1980 Editions,
(All rights reserved).

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Key Business Ratios in the Women's & Misses' Dress Industry
(Median Results)

	1979	1978
Number of manufacturing firms reporting	497	427
Current assets to current debt (times)	1.71	1.70
Net profits on net sales (percent)	2.27	2.10
Net profits on net worth (percent)	21.79	21.85
Net sales to net worth (times)	8.34	8.01
Net sales to net working capital (times)	9.67	9.10
Average collection period (days)	41	45
Net sales to inventory (times)	11.5	11.2

Source: Dun & Bradstreet, Inc.
Business Economic Division,
1979 Key Business Ratios,
(All rights reserved).

By Region

The total value of shipments of all producers plus other receipts for plants classified in the Women's, Misses' & Juniors' Dress Industry (SIC 2335) amounted to $4,189 million in 1977, an increase of 17% from 1972. The value of shipments of products classified as primary to the industry (i.e., dresses) was $4,133 million, the balance being made up of secondary products and other receipts.

New York State accounted for the major share of industry shipments and miscellaneous receipts (42.8%) in 1977, followed by California, with 17%. In 1977, as noted in the table on page 2, the industry has 175.3 employees, a decrease of 17% from 1972. The leading states in employment were New York, California, Pennsylvania and Florida, accounting for approximately 65% of the total. This represents a shift from 1972 when New York, Pennsylvania, California and New Jersey accounted for approximately 60% of the industry's employment.

GENERAL STATISTICS ON THE INDUSTRY

By Region

Women's & Misses' Dress Industry
By Geographic Region and Leading States, 1977

Women's & misses' dresses (SIC 2335)*	Number of Establishments		Employees		Value of Shipments**	
	Total	20 or More Employees	Thous.	% of Total	Mil. of $	% of Total
Total U.S.	6,953	2,473	175.3	100.0%	$4,188.6	100.0%
New England						
New Hampshire	7	5	0.2	0.1	2.4	0.1
Massachusetts	141	79	6.8	3.9	144.9	3.5
Rhode Island	15	9	0.5	0.2	9.7	0.2
Connecticut	55	28	1.8	1.0	18.7	0.4
Middle Atlantic						
New York	2,450	957	54.0	30.8	1,792.1	42.8
New Jersey	380	142	8.7	5.0	183.8	4.4
Pennsylvania	535	365	24.8	14.1	337.7	8.1
East North Central						
Ohio	26	9	0.6	0.3	16.6	0.4
Illinois	73	36	4.3	2.4	147.1	3.5
Michigan	18	2	0.3	0.2	5.2	0.1
West North Central						
Iowa	11	2	0.5	0.3	6.0	0.1
Missouri	38	18	1.9	1.1	38.8	0.9
South Atlantic						
Maryland	18	4	0.6	0.3	9.8	0.2
Virginia	38	25	3.4	1.9	40.2	1.0
West Virginia	17	7	1.3	0.7	20.8	0.5
North Carolina	98	46	4.6	2.6	66.7	1.6
South Carolina	41	24	4.9	2.8	50.9	1.2
Georgia	59	26	2.4	1.4	39.5	0.9
Florida	520	129	8.7	5.0	164.6	3.9
East South Central						
Kentucky	12	4	0.4	0.2	5.6	0.1
Tennessee	57	25	3.7	2.1	44.6	1.1
Alabama	33	17	1.9	1.1	22.1	0.5
West South Central						
Arkansas	18	6	1.4	0.8	30.6	0.7
Oklahoma	16	8	0.7	0.4	9.4	0.2
Texas	200	76	6.8	3.9	184.8	4.4
Mountain						
Arizona	24	3	0.3	0.2	6.2	0.1
Pacific						
California	1,831	356	25.0	14.3	710.7	17.0
Hawaii	68	27	2.0	1.1	38.2	0.9

*For SIC definition, see page 2. Includes manufacturers, jobbers and contractors.
**Includes dresses, secondary products and other industry receipts.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC77-1-23B.

PRODUCTION

The long-term trend in U.S. dress production continues downward, with preliminary data for 1979 indicating a decline of more than 10% in cuttings compared with 1978. Based on statistics compiled by the International Ladies' Garment Workers' Union Research Department, which includes adjustment for underreporting in U.S. Bureau of the Census data, the trend in dress output is indicated in the following indexes.

Trend in U.S. Production of Dresses
(Index, 1966 = 100)

Year	Index
1972	90.1
1973	85.7
1974	73.7
1975	69.3
1976	66.4
1977	67.9
1978	65.3

Current information on production (as well as on the value of shipments) of apparel categories are reported by the U.S. Bureau of the Census in the Current Industrial Reports series, which are based on sample surveys. Monthly estimates are issued, as well as an annual report (the latter based on a larger sampling of manufacturers).

The 1979 apparel survey included both manufacturers and jobbers of apparel. Companies engaged in doing contract work on apparel are excluded. Garments manufactured by the contractor are reported by the jobber who owns the material on which the contractor works. Also excluded from the survey are small firms (many of which may be contractors), which were, however, included in the 1977 and 1972 Censuses of Manufactures. In these industry-wide reports, the Census Bureau estimated production and shipments of small firms based on information available through other government agencies and these small firms represented 32% of the total value of shipments reported for 1977.

An extensive reconciliation was conducted between the Current Industrial Report annual apparel survey (MA-23-A) and the 1977 Census of Manufactures which has resulted in numerous revisions to the 1977 data originally published in the CIR report. Information for 1976 and prior years is not directly comparable and should be used with caution. As noted above, coverage in the CIR reports is still not comparable to 1977 and 1972 census of manufactures data since a sizeable segment of the industry may not be included, but it does indicate trends.

Monthly figures in the CIR series for 1979 and 1980 are currently undergoing revision by the Census Bureau. However, total cuttings of dresses in the first seven months of 1980, based on preliminary data, were 7.7% above the total for the same 1979 period.

PRODUCTION

Production of Dresses & Washable Service Apparel in the U.S.
1972, 1977, 1978, 1979
(In Thousands of Units)

	1979*	1978*	1977	1972	% Change 1979/1978	% Change 1977/1972
Women's, misses', juniors' dresses, total	169,697	189,704	183,162	244,748	-10.5%	-25.2%
Unit-priced	nr	nr	129,762	156,044	--	-16.8
Dozen-priced	nr	nr	53,400	88,704	--	-39.8
Women's, misses', juniors' washable service apparel, incl. uniforms, medical & lab jackets, smocks, etc.	36,924**	34,824**	39,552	27,852	+ 6.0	+42.0
Nurses', maids', etc. uniforms	nr	nr	23,688	25,044	--	- 5.4
Medical, lab jackets, smocks	nr	nr	7,008	2,808	--	+149.6
Washable service apparel, type not specified	--	--	8,856	--	--	--

nr = not reported
*Not comparable to 1977 and 1972, as noted above.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel Survey, MA-23A 79;
Census of Manufactures.

**The National Cotton Council of America has estimated production in this category as follows:

(In Thousands of Units)

	1979	1978	% Change 1979/1978
Women's, misses', juniors' washable service apparel	34,296	32,988	+ 4.0%
Uniforms	26,388	25,392	+ 3.9
Aprons, smocks, etc.	7,908	7,596	+ 4.1

While total production of dresses of all types dropped 10.5% in 1979 compared with 1978, dress production reported in the "Under $6" wholesale price category showed an increase of 4.3%. The biggest share of production, based on reported price lines, however, remained in the $16-and-over bracket.

Dresses made of knit fabrics declined more in 1979 compared with 1978 than noted in figures for woven fabric dresses, registering a decline of 19%.

PRODUCTION

Production of Dresses By Factory (Wholesale) Price Line 1978, 1979

	1979	1978	% Change 1979/1978
Women's, misses', juniors' dresses, total (thous. of units)	169,697	189,704	-10.5%
Percent	100.0%	100.0%	--
Under $6	7.0	6.0	+ 4.3
$6 to $9.99	22.2	24.3	-18.1
$10 to $15.99	26.2	28.8	-18.6
$16 & over	33.6	35.7	-15.7
Price line not specified	10.9	5.2	+88.0

Production of Dresses By Fabric & Construction, 1978, 1979

	1979	1978	% Change 1979/1978
Women's, misses', juniors' dresses, total (thous. of units)	169,697	189,704	-10.5%
Percent	100.0%	100.0%	--
Woven fabric:	56.6	52.1	- 2.8
All cotton & chiefly cotton	7.9	7.3	- 3.4
All man-made & chiefly man-made	43.5	37.7	+ 3.4
All wool & chiefly wool	1.3	1.6	-28.8
All other fabric	3.9	5.5	-36.6
Knit fabric:	33.2	36.4	-19.0
All cotton & chiefly cotton	3.1	3.4	-20.0
All man-made & chiefly man-made	28.5	30.5	-16.5
All wool & chiefly wool	0.7	1.5	-55.5
All other fabric	0.9	1.0	-21.6
Type of fabric not specified	10.2	11.5	-20.4

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, *Apparel*, MA-23A(79).

PRODUCTION

Materials Consumed

The 1977 census of manufactures reports included information on the delivered cost of fabrics consumed in the production of dresses by plants classified in this industry, as noted below:

Value of Fabrics Used in Dress Production, 1972, 1977
(Delivered Cost in Millions of Dollars)

	1977	1972	% Change 1977/1972
Broad woven fabrics	$331.0	$289.5	+14.3%
Purchased knitted fabrics	222.3	427.1	-47.9%

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Industry Series MC77-1-23B.

Seasonality in Production

Based on monthly reports on cuttings of women's dresses issued for 1979 and 1978 by the U.S. Bureau of the Census (which are subject to revision), March is the peak month for output, and accounted for 10.5% of the 1979 total.

Percent of Year's Cuttings of Dresses By Months, 1978, 1979

Month	1979	1978
January	8.6%	7.6%
February	9.3	8.3
March	10.5	9.7
April	8.9	9.4
May	8.7	9.1
June	8.7	8.9
July	6.7	7.0
August	7.7	8.9
September	8.0	8.8
October	8.8	8.3
November	7.5	8.4
December	6.6	5.5
Total for year	100.0%	100.0%

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Apparel (M-23H).

SHIPMENTS

Preliminary data for the year 1979 issued by the Industry & Trade Administration, U.S. Department of Commerce (1980 U.S. Industrial Outlook) placed the total value of shipments of women's, misses' and juniors' dresses in that year at $4.4 billion, up 3.3% compared with 1978 and 6.6% over the value reported for 1977 in the complete census of manufactures.

Value of Shipments of Dresses, 1972, 1977-1979
(Millions of Dollars)

	1979(p)	1978	1977	1972	% Change 1979/1978
Women's, misses', juniors' dresses, total	$4,410	$4,270	$4,133	$3,536	+ 3.3%

(p) = preliminary

Source: U.S. Department of Commerce

The latest industry-wide information on the value of shipments of women's washable service apparel is from the 1977 census of manufacturers. In that year, a total of 39.2 million units were shipped, valued at $193.2 million.

Monthly and annual data on production and shipments of major categories of women's wear are compiled by the Census Bureau and reported in the Current Industrial Reports. However, as previously noted, because of certain limitations in coverage, figures are not comparable to the broader-based data compiled in the complete census of manufacturers.

Value of Shipments of Washable Service Apparel, 1978, 1979
(In Millions of Dollars)

	1979	1978	% Change 1979/1978
Women's, misses', juniors' washable service apparel, including uniforms, medical and lab jackets, smocks, etc.	$224.9	$212.7	+ 5.7%

By Region

Over half (55.1%) of the total value of shipments of unit-priced dresses reported for the year 1977 were shipped by New York State; California followed in importance, accounting for 16.2%.

In dozen-priced dresses (house dresses and the like), New York and Illinois were close in share of shipments, 26.6% and 25.9%, respectively.

Contract work on all types of dresses was separately reported, and New York accounted for the largest share (26.6%) of shipment value in 1977. New York also accounted for the largest share (27.6%) of shipments of washable service apparel for women.

SHIPMENTS

By Region (continued)

Value of Shipments of Dresses & Washable Service Apparel By All Producers By Geographic Area

	Millions of Dollars		% of Total	
	1977	1972	1977	1972
Women's, misses', juniors' dresses				
Unit-priced				
U.S. total	$1,997.7	$1,827.7	100.0%	100.0%
New England division				
Massachusetts	66.2	111.9	3.3	6.1
Connecticut	4.7	nr	0.2	--
Middle Atlantic division				
New York	1,101.7	910.7	55.1	49.8
New Jersey	71.8	nr	3.6	--
Pennsylvania	134.5	nr	6.7	--
East No. Central division				
Illinois	13.7	16.6	0.7	0.9
West No. Central division				
Missouri	33.2	nr	1.7	--
South Atlantic division				
North Carolina	13.1	10.5	0.7	0.6
Georgia	5.0	14.2	0.2	0.7
Florida	46.7	40.7	2.3	2.2
West So. Central division				
Texas	112.9	72.8	5.6	4.0
Pacific division				
California	323.4	238.1	16.2	13.0
Hawaii	23.7	nr	1.2	--
Dozen-priced				
U.S. total	399.1	378.2	100.0	100.0
New England division				
Massachusetts	19.9	nr	5.0	--
Middle Atlantic division				
New York	106.2	140.0	26.6	37.0
New Jersey	5.5	10.0	1.4	2.6
Pennsylvania	32.6	40.4	8.2	10.7
East No. Central division				
Illinois	103.2	48.6	25.9	12.8
South Atlantic division				
South Carolina	12.9	23.2	3.2	6.1
Florida	4.1	8.0	1.0	2.1
East So. Central division				
Alabama	3.2	nr	0.8	--
Pacific division				
California	43.7	nr	10.9	--

(continued)

SHIPMENTS

By Region (continued)

Value of Shipments of Dresses & Washable Service Apparel By All Producers By Geographic Area

(continued)

	Millions of Dollars		% of Total	
	1977	1972	1977	1972
Contract work on				
Women's, misses', juniors' dresses				
U.S. total	$ 694.5	$ 729.7	100.0%	100.0%
New England division				
Massachusetts	33.5	37.9	4.8	5.2
Rhode Island	2.6	2.4	0.4	0.3
Connecticut	9.0	15.0	1.3	2.1
Middle Atlantic division				
New York	184.6	211.3	26.6	29.0
New Jersey	45.8	48.2	6.6	6.6
Pennsylvania	131.2	153.5	18.9	21.0
East No. Central division				
Indiana	5.2	3.1	0.7	0.4
Illinois	13.1	12.7	1.9	1.7
South Atlantic division				
Virginia	19.4	21.5	2.8	2.9
West Virginia	7.5	7.1	1.1	1.0
North Carolina	22.7	14.6	3.3	2.0
South Carolina	22.1	33.4	3.2	4.6
Georgia	11.9	9.8	1.7	1.3
Florida	35.2	26.5	5.1	3.6
East So. Central division				
Tennessee	15.9	nr	2.3	--
Alabama	7.9	11.7	1.1	1.6
West So. Central division				
Arkansas	4.6	3.3	0.7	0.4
Oklahoma	5.5	3.7	0.8	0.5
Texas	26.3	27.3	3.8	3.7
Pacific division				
California	66.0	43.6	9.5	6.0

(continued)

SHIPMENTS

By Region (continued)

Value of Shipments of Dresses & Washable Service Apparel
By All Producers By Geographic Area
(continued)

	Millions of Dollars		% of Total	
	1977	1972	1977	1972
Women's, misses', juniors' washable service apparel				
U.S. total	$ 193.2	$ 105.2	100.0%	100.0%
Middle Atlantic division				
New York	53.3	28.7	27.6	27.3
East No. Central division				
Illinois	2.9	nr	1.5	--
Michigan	2.7	nr	1.4	--
West No. Central division				
Minnesota	3.7	nr	1.9	--
Missouri	20.0	nr	1.0	--
South Atlantic division				
Maryland	7.2	5.4	3.7	5.1
Georgia	22.1	14.1	11.4	13.4
East So. Central division				
Tennessee	12.5	nr	6.5	--
Pacific division				
California	22.8	nr	11.8	--

nr = not reported

Source: U.S. Bureau of the Census,
1977, 1972 Census of Manufactures,
Industry Series MC77-1-23B.

FOREIGN TRADE

The value of imports of women's, misses' and juniors' dresses in 1979 reached close to $103 million, up 9.1% over 1978. According to the Census Bureau, the value of imports has been increasing at a compound annual rate of change of 9.4% in the five year period 1974-1979. Imports of dresses as a percent of total U.S. consumption amounted to 2.3% in 1979, according to the Bureau (1980 U.S. Industrial Outlook).

It was also reported in the 1980 U.S. Industrial Outlook that exports of women's, misses' and juniors' dresses (not including children's) were valued at $37.0 million in 1979, up 0.8% compared with 1978. Exports in current dollars have been increasing at an annual rate of 13.7% in the five year period 1974-1979.

Leading destinations of U.S.-made dresses included Mexico, Canada and Northern Antilles.

Imports by Country of Origin

In 1979, of women's and children's dress imports, the three leading suppliers to the U.S., in rank order, were the Philippines, Hong Kong, and Taiwan with volumes of 6.4, 6.2 and 1.5 million units, respectively.

In dollars, these three countries accounted for 45.6% of the total value of U.S. imports ($109.8 million). Hong Kong exported nearly one-third of this total in 1978 and 1979. All other countries represented less than 10%.

Major changes occurred in silk dress imports from Korea—there was over a 200% increase in both unit and dollar volume for 1979—and in cotton knits from Hong Kong, which reported a 158.1% jump in units and a 150.0% dollar rise.

Silk dress imports led in dollar volume for 1979 with a 25.0% share of total and an 80.1% increase over 1978. In units, although woven man-mades dropped 10.3% in 1979, this dress type led in imports, with 8.2 million units, outpacing the next largest type, wool knits, by 3.4 million units.

FOREIGN TRADE

Imports

Imports of Women's & Children's Dresses By Leading Country of Origin, 1978, 1979

	Quantity (Thous.of Doz.)		% Change	CIF** Value (Mil. of $)		% Change
	1979	1978	1979/1978	1979	1978	1979/1978
Dresses, total	na	na	--	$109.8	$102.2	+ 7.4%
Cotton, not knit, total	363.1	496.4	-26.8%	23.7	30.2	-21.5
India	73.3	128.8	-43.1	5.1	7.5	-32.0
Philippine Rep.	65.4	89.2	-26.7	1.7	2.2	-22.7
Hong Kong	57.7	109.7	-47.4	5.2	8.0	-35.0
Barbados	28.4	20.3	+39.9	1.2	0.7	+71.4
Guyana	22.6	18.2	+24.2	0.9	0.7	+28.6
Wool, not knit, total	4.7	6.7	-29.8	$ 2.3	$ 2.7	-14.8
Hong Kong	1.8	2.7	-33.3	0.6	0.7	-14.3
France	1.0	1.3	-23.1	0.7	0.8	-12.5
Italy	0.6	1.1	-45.4	0.6	0.6	--
Man-made, not knit, total	687.9	766.5	-10.3	$ 27.6	$ 25.4	+ 8.7
Philippine Rep.	363.9	363.8	--	6.2	5.4	+14.8
Haiti	63.5	76.9	-17.4	1.5	1.6	- 6.2
Barbados	50.5	75.6	-33.2	2.1	2.3	- 8.7
Hong Kong	39.2	48.5	-19.2	5.6	3.7	+51.3
Guyana	30.1	33.9	-11.2	1.1	1.1	--
Silk, not knit, total	81.7	38.3	+113.3	$ 28.1	$ 15.6	+80.1
Hong Kong	43.1	23.3	+85.0	12.0	7.0	+71.4
Korean Rep.	30.2	8.2	+268.3	9.3	2.4	+287.5
India	2.7	2.1	+28.6	1.1	0.9	+22.2
Italy	1.8	1.8	--	2.5	2.1	+19.0
Cotton, knit, total	60.6	46.9	+29.2	$ 4.3	$ 3.0	+43.3
Hong Kong	30.2	11.7	+158.1	2.0	0.8	+150.0
Philippine Rep.	4.4	3.7	+18.9	0.1	0.1	--
Colombia	2.6	1.9	+36.8	0.1	0.1	--
Italy	2.5	7.5	-66.6	0.6	0.9	-33.3
France	2.1	2.0	+ 5.0	0.3	0.3	--
Wool, knit, total*	405.3	590.6	-31.4	$ 7.5	$ 9.7	-22.7
Hong Kong	307.2	539.4	-43.0	5.7	7.8	-26.9
Italy	14.3	31.0	-53.9	1.0	1.4	-28.6
France	7.7	3.9	+97.4	0.4	0.2	+100.0
Man-made, knit, total	312.6	302.5	+ 3.3	$ 16.3	$ 15.6	+ 4.5
Taiwan	125.4	115.9	+ 8.2	4.6	4.0	+15.0
Hong Kong	34.0	29.7	+14.5	2.9	2.6	+11.5
Salvador	27.1	11.9	+127.7	1.3	0.7	+85.7
Mexico	25.7	37.7	-31.8	1.7	2.4	-29.2
Philippine Rep.	24.7	28.7	-13.9	0.6	0.7	-14.3

(footnotes continued)

Imports

Imports of Women's & Children's Dresses By Leading Country of Origin, 1978, 1979 (continued)

na - not available
*Quantity reported in thousands of pounds
**CIF (cost, insurance, freight)—refers to value of imports at the first port of entry in the U.S. Based on purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from country of exportation and generally placing it alongside the carrier at first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, Report FT 135,
December, 1978, 1979.

Exports

In 1979 the U.S. exported nearly 10 million dress units worth approximately $46 million. This is a 6.0% increase over the previous year's 9 million, valued at $42.3 million. Nearly three-fourths of the '79 dresses exported were of the woven or not knit classification. Dresses made of synthetics accounted for 77.3% of the wovens, while 51.6% of the knits were cotton.

The breakdown of 1978 unit exports was similar. Slightly less than three-fourths were woven, and of that classification, 65.7% were synthetic. Cotton was the leading fiber in the knit category.

Mexico, Canada and Northern Antilles were the leading U.S. dress importers in 1978 and 1979. Mexico imported approximately one-third or 3.1 million units in 1979, a 171.3% increase over the prior year. Canada and Northern Antilles imported about 1.3 million units in 1979 accounting for 13.5% and 12.8% of total U.S. dress exports.

FOREIGN TRADE

Exports

U.S. Exports of Women's & Children's Dresses, by Type -- 1978, 1979

	Quantity (Thous. of Doz.)		% Change	FAS* Value (Mil. of $)		% Change
	1979	1978	1979/1978	1979	1978	1979/1978
Dresses, total	828.7	781.7	+ 6.0%	46.0	42.3	+ 8.7%
Not knit, total	609.6	575.5	+ 5.9	30.3	29.1	+ 4.1
Cotton	103.2	160.4	-35.7	5.7	8.1	-29.6
Wool	15.9	21.3	-25.3	0.8	1.0	-20.0
Man-made	471.1	378.1	+24.6	22.3	18.8	+18.6
Fiber, n.e.c.	19.4	15.7	+23.6	1.5	1.2	+25.0
Knit, total	219.1	206.2	+ 6.3%	15.7	13.2	+18.9%
Cotton	113.1	93.9	+20.4	6.9	5.1	+35.3
Wool	4.0	5.6	-28.6	0.4	0.3	+33.3
Man-made	87.1	87.8	- 0.8	6.7	6.0	+11.7
Fiber, n.e.c.	14.9	18.9	-21.2	1.7	1.8	- 5.6

*FAS = Value at the U.S. port of export, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance, and any other charges or transportation costs beyond the port of exportation.

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census,
U.S. General Exports, Report FT 410,
December, 1978, 1979.

MARKET POTENTIAL

Female Population, 1979 & Projections (Series II)* to 1985, 1990 & 2000

	Female Population (Number in thous.)				% Change	Percent of Total Population			
	1979	1985	1990	2000	2000/1979	1979	1985	1990	2000
Total, all ages	113,128	119,514	125,023	133,790	+18.3%	51.8%	51.3%	51.3%	51.3%
Under 16 years	26,569	26,986	28,493	29,758	+12.0	12.2	11.6	11.7	11.4
16 years & over	86,559	92,528	96,530	104,032	+20.2	39.6	39.7	39.6	39.9
16-19	8,290	7,074	6,652	7,686	- 7.3	3.8	3.0	2.7	2.9
20-34	27,914	30,226	29,583	25,686	- 8.0	12.8	13.0	12.1	9.9
35-54	24,677	27,544	31,638	39,440	+60.0	11.3	11.8	13.0	15.1
55 & over	25,678	27,684	28,656	31,219	+21.6	11.7	11.9	11.8	12.0
Median age (years)	31.5	32.7	33.9	36.8	--	--	--	--	--

*Series II projections assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 704, July 1977,
Series P-25, No. 870, January 1980.

The "baby boom" began in 1946 and ended in the early 1960's. Those born in the tail end of that boom are now approaching 20. This group (16-19), representing 3.8% of the female and 7.6% of the total, is the smallest segment of the adult portion of the population.

The 20-34 group, now at an unprecedented peak, has caused some speculation on the possibility of a mini baby boom in the 1980's. This group, which represents about one-fourth of the total and 12.2% of the female population, is expected to decline 8.0% by the year 2000, dropping at an annual rate of approximately 2.6%.

For the next 20 years, the age distribution of our population will favor the steadily rising 35-54 segment. By 2000, the number of females in this age group is expected to increase by 60.0% to 39,440,000 or 2.8% a year, according to the U.S. Bureau of the Census (Series II).

The median age for the female portion of the population in the year 2000 is projected at 36.8, a rise of 5.3 years from the present 31.5.

During the 1970's dramatic changes took place in women's participation in the labor market. At the beginning of the decade, about 31 million women, of 43% of all U.S. women 16 years and over, were in the labor force. By 1979, 43 million, or more than half of all women, were working or looking for work. By the first quarter of 1980, 44 million women were employed, a 2.3% increase over the previous year. According to the Urban Institute, the number of women in the labor force is expected to increase to 52 million by 1990. In 1969, the median weekly earnings of a woman working full-time was $86. By March 1980, that figure increased 115.8% to $220.

MARKET POTENTIAL

Women in the Labor Force for Selected Years, 1950-1980
(In Thousands)

	Labor Force		Women as a %	% Change of Women
	Total	Women	of Total	in Labor Force
1950	62,208	18,389	29.6%	
1955	65,023	20,548	31.6	+11.7%
1960	69,628	23,240	33.4	+13.1
1965	74,455	26,200	35.2	+12.7
1970	82,715	31,520	38.1	+20.3
1975	92,613	36,998	39.9	+17.4
1979	102,908	43,391	42.1	+17.3
1st Qtr. 1980	104,194	44,216	42.4	

Source: U.S. Dept. of Labor,
Bureau of Labor Statistics,
"Perspectives on Working Women,"
June, 1980.

In 1979 working women represented a potential market for apparel in excess of $23 billion per year or $525 per year per working woman. Working women spend more, per capita, on clothing than all other apparel purchases, and will account for $128 billion in earnings in 1981. They will spend close to $12 billion for work apparel by that year, almost half of which will go toward pantsuits, skirt-suits and dresses. The average working woman spends approximately $1,700 a year on this apparel.

Other Specialized Dress Markets:

Bridal Market

The number of marriages in the U.S. are on the increase, and there has also been a greater tendency toward formal ceremonies, requiring special bridal dresses. Bride's magazine says the average bride spends about $310 on her wedding gown, including veil.

In 1979 the marriage rate (number per thousand population) broke the post-World War II record set in 1946, reaching 10.5 per thousand. A total of 2,317,000 marriages were performed. In the first eight months of 1980, the number of marriages totaled 1,623,000—up 2.3% compared with the same 1979 period, and the rate reached 11.0 per thousand. June remains the peak month for marriage ceremonies, followed by the month of August.

Bridal Market (continued)

Monthly Pattern in Marriages, 1977-1979

Month	1979	1978	1977
January	5.5%	5.2%	5.2%
February	5.7	5.4	5.9
March	6.4	7.1	7.2
April	8.0	7.2	7.3
May	9.4	9.4	9.1
June	11.8	12.6	12.8
July	9.7	9.3	9.0
August	10.8	11.2	11.0
September	8.7	8.9	8.7
October	8.4	7.6	7.7
November	8.0	7.9	8.0
December	7.6	8.2	8.1
Total	100.0%	100.0%	100.0%

Source: Based on U.S. Department of Health, Education, and Welfare, Monthly Vital Statistics Report.

Maternity Wear

The market for maternity dresses has been picking up along with the rise in the birthrate and in total births. In the 12 months ending August 1980, the birthrate averaged 16.0 live births per 1,000 population, up from 15.5 in this period of 1979, 15.2 in the 1978 period.

There were 2,357,000 live births during the first 8 months of 1980, a 3% increase over the first 8 months of 1979.

Monthly Pattern in Births, 1977 - 1979

Month	1979	1978	1977
January	8.0	8.1	8.3
February	7.3	7.5	7.7
March	8.1	8.3	8.3
April	7.8	7.6	7.8
May	8.2	8.1	8.3
June	8.1	8.2	8.2
July	8.9	8.8	9.0
August	9.4	9.1	8.9
September	8.6	8.8	8.8
October	8.6	8.7	8.5
November	8.7	8.2	7.9
December	8.3	8.6	8.3
Total	100.0%	100.0%	100.0%

Source: Based on U.S. Department of Health, Education & Welfare, Monthly Vital Statistics Report.

THE POTENTIAL MARKET

Service Apparel

The following information concerning women working in occupations where service apparel is worn, is based on data from the U.S. Department of Labor. In 1979 the total number of women working in selected service occupations amounted to 14.1 million, up by 1.3% from the previous year. Of all the selected service occupations reported, the number of women working as nurses, dietitians or therapists experienced the greatest percentage increase.

Of all the occupations mentioned, "operatives (except transport)" have the largest number of employed females. This would include elevator operators, machinery operators, etc.

Women Working in Occupations Where Service Apparel is Worn, 1978, 1979
(Figures in Thousands)

	1979	1978	% Change 1979/1978
Total women in selected occupations	14,123	13,945	+ 1.3
Nurses, dietitians & therapists	1,387	1,255	+10.5
Health technologists & technicians	371	353	+ 5.1
Operatives, except transport	4,353	4,317	+ 0.8
Private household service workers	1,062	1,135	- 6.
Cleaning workers, except private	872	858	+ 1.6
Food service workers	2,941	2,951	- 0.3
Health service workers	1,643	1,659	- 1.0
Personal service workers	1,370	1,302	+ 5.2
Protective service workers	124	115	+ 7.8

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment and Earnings, January 1979, 1980.

Women Employees On Payrolls
In Selected Service Industries, 1977 - 1979
(In Thousands)

	Annual Averages		
	1979	1978	1977
Hotels & other lodging places	559.7	520.4	502.1
Hotels, motels & tourist courts	534.9	497.2	479.3
Personal services	607.8	603.0	588.8
Laundry & dry cleanings	221.4	223.0	222.4
Health services	4,101.1	3,903.6	3,716.8
Hospitals	2,135.0	2,054.4	1,978.7
Eating & drinking places	2,564.3	2,380.1	2,203.6
Gasoline service stations	124.7	117.4	109.4
Total women in selected industries	10,848.9	10,299.1	9,801.1

Source: U.S. Department of Labor, Bureau of Labor Statistics, November 1979, March 1980.

PRICE TRENDS

Prices at retail for women's dresses rose 3.5% between 1978 and 1979, but moved up only a half of a percent for the first six months of 1980.

At wholesale, women's and misses' dress prices increased 6.3% between 1978 and 1979. For the first six months of 1980 prices jumped 7.9%. The greater activity at the producer level is attributed to the 1967 base year.

Consumer Price Index for Women's
Dresses—1978, 1979 & First Half 1980, 1979
(12/67 = 100)

	Annual Avg.		Jan.-June Avg.		% Change	
					Annual Avg.	Jan.-June Avg.
	1979	1978	1980	1979	'79/'78	'80/'79
Women's dresses	164.1	158.6	164.4	163.6	+ 3.5%	+ 0.5%

Source: U.S. Department of Labor,
Bureau of Labor Statistics,
Monthly Labor Review.

Wholesale Price Index for Women's & Misses'
Dresses—1978, 1979 & First Half 1980, 1979
(12/77 = 100)

	Annual Avg.		Jan.-June Avg.		% Change	
					Annual Avg.	Jan.-June Avg.
	1979	1978	1980	1979	'79/'78	'80/'79
Women's & misses' dresses	107.0	100.7	113.7	105.4	+ 6.3%	+ 7.9%

Source: U.S. Department of Labor
Bureau of Labor Statistics,
Producer Prices and Price Indexes.

RETAIL SALES

According to a trade source, dress unit sales have dropped from 365 million in 1969 to 211 million units in 1979 (WWD, August 13, 1980).

The retail market for women's dresses is currently valued in excess of $6 billion. In the reports on merchandise line sales by store type, covering outlets with payrolls only, compiled in the 1977 census of retail trade by the U.S. Bureau of the Census, a total of $5.4 billion in retail sales of women's, misses' and juniors' dresses was covered.

Women's ready-to-wear specialty stores accounted for the largest share of this reported total—47.4% in 1977, up from a comparable figure of 45.4% in 1972 census reports. Stores classified as department stores had the second largest share of the market—40.7%, down from 44.2% in the 1972 census.

Reported Sales of Women's Dresses by Store Type, 1977
(Including Stores With Payrolls Only)

	Stores Reporting Dress Sales		Reported Dress Sales	
	Number	Percent	Mil. $	Percent
Total	56,036	100.0%	$5,434.9	100.0%
Women's ready-to-wear stores	32,048	57.2	2,574.4	47.4
Department stores**	8,254	14.7	2,213.7	40.7
Family clothing stores	10,862	19.4	489.2	9.0
Mail order houses	3,650	6.5	122.1	2.3
Other apparel stores***	1,222	2.2	35.5	0.6

*Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within the stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order houses.

***Includes lingerie shops and other specialized women's apparel outlets, shoe stores, children's wear stores, and stores primarily selling men's wear.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

The 32,048 women's ready-to-wear stores, reporting sales of women's dresses, contributed 23.9% of total store volume in 1977. In the 1972 census of retail trade, 29,170 women's ready-to-wear stores (with payrolls) reported on dress sales and this department represented 29.3% of total volume.

Women's, misses' and juniors' dress departments accounted for 3.1% of the total sales of department stores reporting on dress business in the 1977 census. In 1972, this department representdd 4.3% of total department store sales.

In family clothing stores (which sell both men's and women's wear), dress departments accounted for 7.4% of sales in stores handling this merchandise in 1977. The comparable figure in 1972 was 9.5%.

RETAIL SALES

Seasonal Patterns

Percent of Total Sales By Month
In Dress and Service Apparel Departments

Month	Women's & Misses' Dresses	Better Dresses	Inexpensive Dresses	Aprons, Housedresses & Uniforms
January	5.9%	6.0%	5.7%	6.1%
February	6.0	6.4	5.7	6.2
March	9.0	9.1	8.7	8.1
April	10.0	10.1	10.0	9.8
May	11.1	10.2	11.2	12.3
June	8.4	8.0	8.9	9.9
July	6.6	6.6	6.8	7.8
August	7.4	7.8	7.3	7.1
September	9.2	9.4	9.1	7.7
October	9.0	9.1	8.9	7.3
November	7.8	8.0	7.6	7.4
December	9.6	9.3	10.1	10.3
Total	100.0%	100.0%	100.0%	100.0%

Source: Newspaper Advertising Bureau,
1980 Newspaper Advertising Planbook,
representing a 5-year average (1961-1965).

MERCHANDISING & OPERATING RESULTS

Specialty Stores

The typical specialty store reporting to the National Retail Merchants Association showed a 3.3% increase in the misses' dress business in 1979 compared with 1978 and a 2.8% gain in junior dress department sales. Women's dresses, however, were down 3.6%. This compared with an overall median gain of 6.9% in total adult female apparel for reporting stores.

Markdowns averaged highest in misses' dresses—at 28.4% compared with an overall average of 21.9% of sales of all women's wear.

Specialty Stores (continued)

Dress Department Merchandising & Operating Results in
Specialty Stores with Total Annual Sales Over $1 Million, 1979
Typical (Median) Results

	Total Store (52)	All Adult Female Apparel (51)	Women's Dresses (17)	Misses' Dresses (19)	Junior Dresses (26)
Net sales. % change from last year	+ 6.1%	+ 6.9%	- 3.6%	+ 3.3%	+ 2.8%
Sales, % to total store sales	100.0	64.2	0.8	3.6	7.2
Net sales % of adult female apparel	--	100.0	1.5	6.6	10.1
$ sales per sq. ft. of selling space	$146.3	$145.1	$ 95.1	$120.9	$ 90.0
Cumulative mark-on, %	50.5%	50.9%	50.5%	50.2%	50.5%
Gross margin, % of sales incl. cash discounts	42.7	42.2	41.3	37.3	43.0
Markdowns, retail, % of sales	19.4	21.9	24.9	28.4	23.9
Number of stock turns	3.1	3.9	3.7	3.9	4.8

Source: National Retail Merchants Association,
"Merchandising & Operating Results,"
(1980 Edition).

Department Stores

According to the National Retail Merchants Association, the typical department store showed a drop of close to 7% in sales of women's dress departments in 1979 compared with 1978, and junior dress business was down almost 2%. Misses' dress departments managed a slight gain in the typical department store. This compared with an overall gain of 7% in the typical store for all adult female apparel.

Markdowns averaged lower than in specialty store dress departments, but, again, were highest in the misses' dress departments.

MERCHANDISING & OPERATING RESULTS

Department Stores (continued)

Dress & Related Departmental Merchandising & Operating Results In Department Stores with Total Annual Sales Over $1 Million, 1979

(Typical (Median) Results)

	Total Upstairs Store (143)	All Adult Female Apparel (147)	Bridal/ Formal Dresses (57)	Women's Dresses (96)	Misses' Dresses (96)	Junior Dresses (108)	Utility Dresses, Aprons & Uniforms (37)	Maternity Wear (57)
Net sales, % change from last year	+ 5.5%	+ 7.0%	+ 2.1%	- 6.8%	+ 0.4%	- 1.9%	- 7.4%	+ 2.3%
Sales, % to total store sales	89.2	36.7	0.2	0.4	2.3	0.7	0.6	0.1
Net sales % of adult female apparel	--	100.0	0.4	1.0	6.4	1.9	1.6	0.3
$ sales per sq. ft. of selling space	$ 91.6	$107.4	$ 49.8	$ 81.0	$ 84.9	$ 82.4	$ 80.0	$ 81.9
Cumulative mark-on, %	48.0%	50.2%	49.7%	49.9%	49.9%	50.2%	49.2%	51.1%
Gross margin, % of sales incl. cash discounts	42.2	43.6	38.9	40.7	39.2	40.7	42.9	49.3
Markdowns, retail, % of sales	13.2	18.2	14.9	22.9	24.7	23.1	17.5	11.1
Returns, % of sales	8.0	10.0	8.7	13.3	14.8	11.4	12.4	7.4
Sales promotions, % of sales	3.0	3.1	3.2	3.5	3.3	3.0	3.2	2.1
Salespeople's salaries, % of sales	7.7	7.2	9.1	7.8	7.7	6.5	8.2	8.3
Number of stock turns	3.1	4.0	2.4	3.5	3.5	4.4	4.2	3.3

Source: National Retail Merchants Association,
"Merchandising & Operating Results,"
(1980 Edition).

CONSUMER BUYING HABITS

NPD Research, Inc. compiles the NPD (National Panel Diary) Textile and Apparel Market Index, a specialized service based on an on-going monthly diary tracing the purchases of 6,500 nationally representative families. Findings for the 1977, 1978 and 1979 years, covering women's dresses are given below.

Percent of Women's Dress Purchases by Price Points, 1977-1979

	1979		1978		1977	
	Units	$	Units	$	Units	$
Less than $10.00	19.6%	5.5%	23.3%	6.5%	22.1%	6.6%
$10.00 - $19.99	35.7	23.3	32.1	21.0	34.2	22.8
$20.00 - $29.99	20.3	21.3	19.1	20.3	19.4	21.2
$30.00 - $39.99	11.9	16.0	11.8	17.6	12.5	19.1
$40.00 - $49.99	6.5	12.2	6.0	11.5	5.7	11.2
$50.00 - $79.99	6.8	14.9	6.4	16.6	4.9	13.2
$80.00 & over	1.3	6.7	1.2	6.5	1.1	5.8

Source: NPD Research, Inc.

According to NPD's panel reports, the greatest concentration of dress purchases is in the $10.00 to $19.99 price range category, followed by the $20.00 to $29.99 grouping. Higher priced dresses, $80.00 and over, accounted for 6.7% of dollar sales in 1979, slightly higher than the 1978 report.

In using results of panel reports, however, it should be kept in mind that women in upper income brackets, who do most of the spending for $80-and-over dresses, are underrepresented in such data.

Specialty stores continued to hold the highest share of reported dress purchases in 1979 according to National Panel Diary. From 1977 to 1979 purchases in specialty stores decreased approximately 1.5 percentage points, but kept an overall average of just over 30%.

Department stores, in second place, accounted for 28.7% of dress purchases reported by panel members in 1979 and in 1978.

Percent of Dress Purchases by Outlet Type, 1977-1980

	1979		1978		1977	
Store type	Units	$	Units	$	Units	$
Department	28.7%	34.5%	28.7%	33.9%	30.7%	35.8%
Specialty	31.3	38.1	32.5	40.6	32.8	39.6
Discount	17.6	9.8	14.2	7.8	13.6	7.7
Variety	16.5	12.5	18.0	11.9	16.5	11.7
Mail Order	2.0	1.9	2.0	1.7	1.3	1.4
Other	3.9	3.0	4.6	3.9	4.1	3.8

Source: NPD Research, Inc.

CONSUMER BUYING HABITS

NPD's panel reports showed a concentration of dress purchases in the spring and early summer, as noted below.

Percent Distribution of Reported Dress Purchases by Months, 1977 - 1979

Month	1979		1978		1977	
	Units	$	Units	$	Units	$
January	4.6%	4.5%	4.0%	3.8%	3.7%	4.1%
February	5.8	5.4	5.5	5.9	6.2	6.1
March	9.0	9.9	9.0	8.6	8.6	9.2
April	11.7	12.5	9.[illegible]	10.1	11.9	12.6
May	11.9	11.3	12.7	11.2	11.1	10.8
June	11.5	10.8	11.7	10.1	9.6	8.4
July	9.9	8.7	11.2	9.4	11.1	8.8
August	8.5	7.2	8.3	7.6	9.1	8.7
September	7.8	8.3	7.3	9.4	7.2	7.9
October	5.6	6.6	7.2	7.9	6.8	7.6
November	6.3	6.6	5.8	6.8	6.1	6.8
December	7.4	8.1	7.7	9.1	8.6	9.2
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NPD Research, Inc.

A Media General Market Analysis, covering Hillsborough County, Florida, developed information on dress purchases through personal interviews conducted by Belden Associates, Dallas, Texas. The report was issued in November 1980, and reflects purchasing patterns among 447,000 adults (including 236,000 women).

Among all adults 18 years and older in Hillsborough County, in the 12 months prior to the study, 23% had purchased dressy dresses, 25% had purchased casual dresses. Considering age groups, the highest incidence of purchasers of dressy dresses is between the ages of 25-34 years (30%).

Hillsborough County, Fla. Adults Who Purchased Dresses In The Past 12 Months.

Age of Purchaser	Dressy Dress	Casual Dress
18 - 24 years	26%	24%
25 - 34 years	30	32
35 - 44 years	16	22
45 - 54 years	29	23
55 - 64 years	20	24
65 years & over	15	23
Annual household gross income		
Under $10,000	22	24
$10,000 - $19,999	20	25
$20,000 - $34,999	28	26
$35,000 & over	27	33

Note: Total adults (male and female) in each age and income group equal 100% in the above table.

CONSUMER BUYING HABITS

In September 1978, Seventeen Magazine conducted a mail survey among members of their Consumer Panel representing a cross-section of teenagers currently attending high school or college. A total of 2,679 returns were received, representing a total of 9,280,000 teenage-female students in the U.S.

A projected total of 6,694,000 had purchased dresses, spending a total of $469,310,000 for 16,645,000 dresses of all types in preparation for returning to school in the fall, 1978.

Dress Purchases By Teenage Females

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Dresses			
School	*	9,556	$234,170
Date	*	4,385	132,140
Formal gowns	1,547	1,848	84,210
Jumpers	690	856	18,790
Total	6,694	16,645	$469,310

*Figures were reported by dress length and are not additive.

Type of Store Where Dresses Are Usually Purchased

	Percent*
Total	100.0%
Department store	59.0
Boutique/specialty store	41.0
Discount store	5.0
Variety store	4.0
Mail order	2.0
Other	5.0
No answer	2.0

*Adds to more than 100.0% due to multiple responses.

(continued)

Size of Dress Last Purchased

	Percent
Junior size (78.0% of total)	100.0%
Size 3	4.2
5	18.5
7	27.6
9	25.6
11	16.4
13	6.9
15 or larger	0.8
Misses size (15.2% of total)	100.0%
Size 4 to 8	22.3
10	23.1
12	21.1
14	16.5
16	11.8
18 or larger	5.2
No answer (6.8% of total)	

Source: Seventeen's Back-to-School Study/1979.

Detailed findings in a series of surveys conducted in 1978-1979 for Women's Wear Daily by The Home Testing Institute on women's apparel buying habits, including dresses, will be found in two special Fact File Editions: The Customer Speaks - 1979, and The Customer Speaks - 1980.

FAIRCHILD FACT FILES AVAILABLE FOR 1980

CONSUMER MARKET DEVELOPMENTS: Summarizes key economic trends and indicators, particularly those having a direct relationship to the consumer market for durable and nondurable goods. A wide variety of sources are drawn on to present an overview of economic developments and market trends, as well as consumer market dynamics, including trends by age group, educational and income levels, buying patterns and outlook.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES: Covers the latest available annual sales of department stores throughout the country listed by buying headquarter location. Includes data on number of outlets covered in reported sales totals, as well as information on sales for many branch and main stores. Some leading specialty operations are also included in the listing by location. Other listings: department store operations with sales of $50 million or more reported in order of volume, major conglomerates with general merchandise store or apparel store divisions, and department stores operated by major department store corporations.

FASHION ACCESSORIES: Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME ELECTRONICS: A statistical summary of the consumer electronics market. Product classifications include home entertainment and related products (television sets, radios, stereos, audio and video systems, video games, etc.) as well as home security and fire protection devices and calculators. Data presented at the manufacturer, retailer, and consumer levels.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS', AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on operating ratios in department and specialty stores, seasonal patterns in advertising, more. Information is also presented on consumer spending and buying preferences.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S CLOTHING, TAILORED SPORTSWEAR AND RAINWEAR: Manufacturer level profiled by production, value of shipments, employment, size of firms, more. Imports from key foreign sources by unit and dollar value covered, and data is also presented on retail sales and merchandising.

MEN'S FURNISHINGS AND CAREER/WORK WEAR: Includes information on number of manufacturers, production and shipment figures, geographical distribution, size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, and advertising patterns.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S, WOMEN'S, AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipment, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

MEN'S, WOMEN'S AND CHILDREN'S FOOTWEAR: Findings in a 1980 survey on consumer purchases of footwear are an important new feature of this FACT FILE. Also included are data on major trends in the industry in relation to imports, domestic production and shipments, as well as developments at the retail level.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE-APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics, as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills. Also: exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry, covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditure data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type, and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S INNER FASHIONS: NIGHTWEAR AND DAYWEAR: Data on production and shipments, tracing market shifts in response to fashion changes. Also: imports, retail trends and merchandising ratios, and data on consumer buying habits.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

For orders and further information, please write to:

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Market Research Division
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MEN'S FURNISHINGS

Market Trends

Despite the current inflationary pressures on the U.S. consumer to limit his apparel expenditures, sales of men's furnishings appear to be holding up well. In fact, many of these items are enjoying increased, rather than decreased, sales. The prevailing logic behind this apparent trend is that men prefer to buy shirts, neckwear and other furnishings items to add new sparkle to their existing wardrobes in lieu of buying big ticket items such as sport coats and suits.

For this reason, style and color are becoming more important to men in their selection of furnishings. A prime example of this is in dress shirts, where one estimate has sales of striped dress shirts in 1981 falling to about 60% of patterned purchases with the balance made up by fabrics that were considered "sportswear" not too long ago, such as lively checks and plaids. The practicality and economy of combined dress/sport shirts has also given rise to colors new to the dress shirt industry.

Consumers are also demanding quality with a guarantee of long-life from the furnishings they buy. Retailers are reporting more sales at higher price points beyond mere inflationary increases. In addition, goods made from all-natural fibers such as cotton for shirts, underwear and nightwear and silks and wools for neckwear, are enjoying moderate sales success.

Not only does the term furnishings cover a very diversified group of products—ranging from neckwear to underwear, but merchandising practices and definitions vary from store to store, with some items considered as sportswear or accessories.

Information on sport shirts is covered in this Fact File only where data is combined with dress shirts. Men's sport shirts are covered extensively in the Men's Sportswear, Casual Wear, Jeans and Active Wear Fact File. Analyses of recent trends in the hosiery industry (both men's and women's) is part of the Bodywear and Legwear/Hosiery Fact File. Accessories (jewelry, small leather goods, etc.), often included in men's furnishings are not covered in detail in this Fact File, but are covered in the Fashion Accessories (Men's and Women's) Fact File.

AT THE MANUFACTURER LEVEL

The latest detailed information on manufacturers classified in the men's furnishings industry is contained in the recently released 1977 Census of Manufactures reports issued by the U.S. Census Bureau. This is the first complete census conducted since 1972.

According to the census, there were 667 companies with 928 plants in the men's and boys' shirt and nightwear industry in 1977. The value of shipments (including goods not classified in this industry and miscellaneous receipts) from these plants was $2.9 billion, a 39.5% increase over the 1972 shipment value. Value added by manufacture was, at $1.4 billion, 44.0% higher than in 1972.

With the exception of men's and boys' neckwear, every industry group classified in the men's furnishings industry gained over 1972 both in value of shipments and value added by manufacture.

GENERAL STATISTICS ON THE INDUSTRY

Dress Shirt and Nightwear Industry (SIC 2321*)

	1977	1972	% Change 1977/1972
Number of companies	667	516	+ 29.3%
Number of establishments, total**	928	731	+ 26.9
Number with 20 or more employees	679	564	+ 20.4
Employees, total (thous.)	114.7	113.4	+ 1.1
Production workers (thous.)	103.0	102.0	+ 1.0
Payroll (mil. $)	$ 711.3	$ 514.9	+ 38.1
Value added by manufacture# (mil. $)	$1,445.7	$1,003.8	+ 44.0
Value of shipments## (mil. $)	$2,934.6	$2,104.3	+ 39.5
Capital expenditures, new (mil. $)	$ 25.9	$ 24.1	+ 7.5

Underwear (SIC 2322*)

	1977	1972	% Change 1977/1972
Number of companies	56	67	- 16.4%
Number of establishments, total**	76	94	- 19.1
Number with 20 or more employees	59	73	- 19.2
Employees, total (thous.)	15.1	16.0	- 5.6
Production workers (thous.)	13.7	15.1	- 9.3
Payroll (mil. $)	$ 92.2	$ 68.6	+ 34.4
Value added by manufacture# (mil. $)	$218.2	$130.9	+ 66.7
Value of shipments## (mil. $)	$419.8	$239.3	+ 75.4
Capital expenditures, new (mil.$)	$ 2.6	$ 5.7	- 54.4

Neckwear (SIC 2323*)

	1977	1972	% Change 1977/1972
Number of companies	199	291	- 31.6%
Number of establishments, total**	207	299	- 30.8
Number with 20 or more employees	81	135	- 40.0
Employees, total (thous.)	6.3	11.1	- 43.2
Production workers (thous.)	5.1	8.8	- 42.0
Payroll (mil. $)	$ 57.5	$ 70.0	- 17.9
Value added by manufacture# (mil. $)	$117.5	$143.4	- 18.1
Value of shipments## (mil. $)	$223.8	$294.9	- 24.1
Capital expenditures, new (mil. $)	$ 2.6	$ 4.0	- 35.0

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Hats and Caps (SIC 2352*)

	1977	1972	% Change 1977/1972
Number of companies	230	253	- 9.1%
Number of establishments, total**	258	280	- 7.9
Number with 20 or more employees	122	122	--
Employees, total (thous.)	12.4	11.3	+ 9.7
Production workers (thous.)	11.1	10.0	+ 11.0
Payroll (mil. $)	$ 85.1	$ 55.6	+ 53.1
Value added by manufacture# (mil. $)	$152.7	$100.2	+ 52.4
Value of shipments## (mil. $)	$284.8	$171.0	+ 66.5
Capital expenditures, new (mil. $)	$ 3.9	$ 1.9	+105.3

Hosiery, n.e.c. (Primarily Men's) (SIC 2252*)

	1977	1972	% Change 1977/1972
Number of companies	382	375	+ 1.9%
Number of establishments, total**	415	415	--
Number with 20 or more employees	257	269	- 4.5
Employees, total (thous.)	32.2	32.6	- 1.2
Production workers (thous.)	29.0	29.3	- 1.0
Payroll (mil. $)	$218.7	$159.7	+ 36.9
Value added by manufacture# (mil. $)	$401.5	$295.2	+ 36.0
Value of shipments## (mil. $)	$921.3	$600.6	+ 53.4
Capital expenditures, new (mil. $)	$ 14.8	$ 12.5	+ 18.4

Knit Underwear Mills (SIC 2254*)

	1977	1972	% Change 1977/1972
Number of companies	80	74	+ 8.1%
Number of establishments, total**	92	87	+ 5.7
Number with 20 or more employees	74	74	--
Employees, total (thous.)	25.2	26.0	- 3.1
Production workers (thous.)	23.4	23.8	- 1.7
Payroll (mil. $)	$175.2	$134.6	+ 30.2
Value added by manufacture# (mil. $)	$305.7	$251.5	+ 21.5
Value of shipments## (mil. $)	$648.9	$544.6	+ 19.1
Capital expenditures, new (mil. $)	$ 14.5	$ 7.0	+107.1

(continued—footnotes following)

GENERAL STATISTICS ON THE INDUSTRY

n.e.c. = not elsewhere classified

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2321 comprises establishments primarily engaged in manufacturing men's, youths' and boys' shirts, collars and nightwear from purchased woven or knit fabric (cut-and-sewed). Also includes manufacturers of knit outerwear sports shirts from purchased knit fabric. Does not include work shirt manufacturers. For 1977 the 928 establishments (plants) in this industry included 469 manufacturers, 108 jobbers, 192 independent contractors and 159 multiplant company contractors.

SIC 2322 includes establishments primarily engaged in manufacturing men's, youths', boys' underwear cut and sewed from purchased woven or knit fabric.

SIC 2323 comprises establishments primarily engaged in manufacturing men's, youths' and boys' neckties, scarfs and mufflers cut and sewed from purchased woven or knit fabric.

SIC 2352 includes establishments primarily engaged in manufacturing hats, caps and hat bodies. Millinery is not included.

SIC 2252 includes mills primarily making men's and boys' hosiery. It includes mills engaged in knitting, dyeing or finishing hosiery except women's hosiery. In addition to men's and boys' hosiery, the industry makes anklets for women and children, slipper socks, etc.

SIC 2254 includes establishments primarily engaged in knitting underwear and nightwear from yarn, or in making them from knit fabric produced in the same mill.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for more purposes the best value of measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made in these industries. The value of the primary product alone in men's furnishings of these industries, plus the values of these products produced by manufacturers classified in other industries, are shown on pages 16 and 17.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977 & 1972.

GENERAL STATISTICS ON THE INDUSTRY

Manufacturing Establishments in the Men's Furnishings Industry By Employment Class Size, 1977

	Establishments		Employees		Value of Shipments	
	No.	% of Total	No. (thous.)	% of Total	Mil. $	% of Total
Shirts and nightwear (SIC 2321*), total	928	100.0%	114.9	100.0%	$2,934.6	100.0%
By Establishment Size:						
Under 20 employees	249	26.8	1.7	1.5	97.3	3.3
20-49 employees	156	16.8	5.0	4.3	336.8	11.5
50-99 employees	147	15.8	10.8	9.4	392.2	13.4
100-249 employees	229	24.7	37.5	32.6	675.4	23.0
250 or more employees	147	15.8	59.9	52.2	1,433.0	48.8
Underwear (SIC 2322*), total	76	100.0%	15.1	100.0%	$ 419.8	100.0%
By Establishment Size:						
Under 10 employees	12	15.8	0.1	0.7	1.1	0.3
10-49 employees	17	22.4	0.5	3.3	9.5	2.3
50-249 employees	19	25.0	2.1	13.9	46.3	11.0
250-499 employees	19	25.0	6.1	40.4	137.1	32.7
500 or more employees	9	11.8	6.3	41.7	225.8	53.8
Neckwear (SIC 2323*), total	207	100.0%	6.3	100.0%	$ 223.8	100.0%
By Establishment Size:						
Under 10 employees	99	47.8	0.2	3.2	9.1	4.1
10-19 employees	27	13.0	0.4	6.4	11.2	5.0
20-49 employees	46	22.2	1.5	23.8	53.1	23.7
50-99 employees	25	12.1	1.9	30.2	67.6	30.2
100 or more employees	10	4.8	2.3	[illegible]6.5	82.8	37.0
Hats & caps ~~(SIC~~ 2352*), total	258	100.0%	12.4	100.0%	$ 284.8	100.0%
By Establishment Size:						
Under 10 employees	101	39.1	0.3	2.4	7.7	2.7
10-49 employees	91	35.3	2.3	18.5	54.0	19.0
50-99 employees	30	11.6	2.2	17.7	62.7	22.0
100-249 employees	25	9.7	3.5	28.2	69.5	24.4
250 or more employees	11	4.3	4.1	33.1	90.8	31.9
Hosiery, n.e.c. (SIC 2252*), total	415	100.0%	32.2	100.0%	$ 921.3	100.0%
By Establishment Size:						
Under 20 employees	158	38.1	1.0	3.1	31.9	3.5
20-49 employees	94	22.6	3.1	9.6	86.2	9.4
50-99 employees	62	14.9	4.4	13.7	114.5	12.4
100-249 employees	68	16.4	10.8	33.5	304.7	33.1
250 or more employees	33	8.0	12.8	39.7	384.0	41.7

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Manufacturing Establishments in the Men's Furnishings Industry
By Employment Class Size, 1977
(continued)

	Establishments		Employees		Value of Shipments	
	No.	% of Total	No. (thous.)	% of Total	Mil.$	% of Total
Knit underwear mills (SIC 2254*), total	92	100.0%	25.2	100.0%	$648.9	100.0%
By Establishment Size:						
Under 20 employees	18	19.6	**	--	2.6	0.4
20-49 employees	14	15.2	0.5	2.0	8.2	1.3
50-99 employees	15	16.3	1.2	4.8	24.6	3.8
100-249 employees	22	23.9	3.4	13.5	98.3	15.1
250 or more employees	23	25.0	20.1	79.7	515.3	79.4

* For a definition of these SIC codes, see page 4.
** Total is less than 0.1.
n.e.c. - not elsewhere classified.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

Employment & Earnings

According to the U.S. Bureau of Labor Statistics, employment in the men's and boys' shirt and nightwear industry was 102.3 thousand in October 1980, a 2.6% decline from October 1979 and 3.6% below the 1978 average. The number of production workers fell 4.4% in October 1980 compared to 1978.

Average hourly earnings of production workers increased 21.0% from 1978 to October 1980 but because average weekly hours declined slightly, average weekly earnings did not increase as fast, rising 20.7% to $152.04 as of October 1980.

Employment in knit underwear mills was up slightly in October 1980 versus a year ago. Average weekly hours also rose during this period after declining 4.5% in 1979 compared with 1978.

GENERAL STATISTICS ON THE INDUSTRY

Employment and Earnings in the Men's Furnishings Industry

	Monthly Averages			Annual Averages		
	Oct. 1980(p)	Oct. 1979	% Change	1979	1978	% Change 1979/1978
Shirts & nightwear (SIC 2321*)						
All employees (thous.)	102.3	105.1	- 2.7%	103.8	106.1	- 2.2%
Production workers (thous.)	88.2	91.5	- 3.6	90.5	92.3	- 2.0
Avg. weekly earnings	$152.04	$139.78	+ 8.8	$136.84	$125.96	+ 8.6
Avg. hourly earnings	$ 4.20	$ 3.84	+ 9.4	3.78	3.47	+ 8.9
Avg. weekly hours	36.2	36.4	- 0.5	36.2	36.3	- 0.3
Avg. overtime hours	1.1	1.2	- 8.3	1.0	1.0	--
Knit underwear mills (SIC 2254*)						
All employees (thous.)	32.0	31.8	+ 0.6%	32.3	33.5	- 3.6%
Production workers (thous.)	27.6	27.6	--	27.9	29.0	- 3.8
Avg. weekly earnings	$169.00	$150.95	+12.0	$147.24	$141.00	+ 4.4
Avg. hourly earnings	$ 4.63	$ 4.17	+11.0	$ 4.09	$ 3.74	+ 9.4
Avg. weekly hours	36.5	36.2	+ 0.8	36.0	37.7	- 4.5
Avg. overtime hours	1.4	1.3	+ 7.7	1.2	2.1	-42.9

(p) = preliminary

* For a definition of these SIC codes, see page 4.

Source: U.S. Bureau of Labor Statistics
Employment and Earnings.

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

In terms of shipment value, New York was the leading manufacturing state in 1977 in three of the six industries which constitute the overall men's furnishings industry in this Fact File. Pennsylvania was the leading state in two industries: men's & boys' underwear and knit underwear mills. North Carolina held a clearly dominant manufacturing share of the hosiery, n.e.c. classification.

Leading Manufacturing States in the Men's Furnishings Industry

	Establishments			Value of
	No.	With 20+ Employees	Employees (thous.)	Shipments (mil. $)
Shirts and nightwear (SIC 2321*), total	928	679	114.7	$2,934.6
Leading States:				
New York	156	69	6.1	463.2
California	130	76	5.5	241.1
North Carolina	85	71	13.6	251.5
Pennsylvania	76	67	10.4	245.8
Alabama	62	60	15.0	320.6
Tennessee	59	54	12.8	290.1
Georgia	42	40	9.2	212.5
Total, leading states	610	437	72.6	2,024.8
Percent of U.S. total	65.7%	64.4%	63.3%	69.0%
Underwear (SIC 2322*), total	76	59	15.1	$ 419.8
Leading States:				
New York	12	4	0.3	9.8
Pennsylvania	10	7	0.8	16.6
North Carolina	8	6	(D)	(D)
Kentucky	7	7	(D)	(D)
South Carolina	6	6	1.4	31.9
Total, leading states	43	30	na	na
Percent of U.S. total	56.6%	50.8%	na	na
Neckwear (SIC 2323*), total	207	81	6.3	$ 223.8
Leading States:				
New York	87	35	2.3	87.9
California	20	9	(D)	(D)
New Jersey	13	4	0.3	7.0
Massachusetts	10	4	0.2	5.7
Connecticut	9	6	0.3	10.5
Total, leading states	139	58	na	na
Percent of U.S. total	67.1%	71.6%	na	na

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading Manufacturing States in the Men's Furnishings Industry (continued)

	Establishments No.	Establishments With 20+ Employees	Employees (thous.)	Value of Shipments (mil. $)
Hats & caps (SIC 2352*), total	258	122	12.4	$ 284.8
Leading States:				
New York	86	28	1.9	42.6
Missouri	34	28	(D)	(D)
Pennsylvania	20	11	(D)	(D)
California	17	5	0.4	10.1
Texas	15	7	(D)	(D)
Illinois	12	6	(D)	(D)
New Jersey	12	6	(D)	(D)
Massachusetts	11	4	0.5	9.1
Total, leading states	207	95	na	na
Percent of U.S. total	80.2%	77.9%	na	na
Hosiery, n.e.c. (SIC 2252*), total	415	257	32.2	$ 921.3
Leading States:				
North Carolina	281	168	20.3	589.9
Tennessee	35	29	4.2	111.7
Alabama	28	15	1.4	32.2
Georgia	22	15	1.9	52.1
Total, leading states	366	227	27.8	785.9
Percent of U.S. total	88.2%	88.3%	86.3%	85.3%
Knit underwear mills (SIC 2254*), total	92	74	25.2	$ 648.9
Leading States:				
Pennsylvania	34	29	4.5	147.5
New York	14	9	1.0	29.8
North Carolina	14	10	4.7	100.8
Tennessee	5	5	(D)	(D)
Mississippi	4	4	1.4	34.7
Total, leading states	71	57	na	na
Percent of U.S. total	77.2%	77.0%	na	na

*For a definition of these SIC codes, see page 4.
n.e.c. = not elsewhere classified
(D) = Data withheld by the Census Bureau to avoid disclosing figures for individual firms.
na = not available

Source: Based on U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

GENERAL STATISTICS ON THE INDUSTRY

Manufacturers' Operating Ratios

Selected Operating Ratios for Manufacturers in the Men's Furnishings Industry, 1980
(Median Results)

	No. of Companies Reporting	Current Assets to Current Debt (times)	Net Profits on Net Sales (percent)	Profits on Net Worth (percent)	Sales to Net Worth (times)
Shirts & nightwear (SIC 2321*)	156	1.88	2.40	15.95	6.72
Underwear (SIC 2322*)	14	2.05	0.52	4.85	3.75
Neckwear (SIC 2323*)	37	2.51	2.59	15.11	4.83
Hats & caps (SIC 2352*)	36	1.77	2.05	19.15	5.83
Hosiery, n.e.c. (SIC 2252*)	63	2.61	1.90	20.57	5.22
Knit underwear mills (SIC 2254*)	18	2.57	6.79	26.08	3.44

n.e.c. = not elsewhere classified.
* For a definition of these SIC codes, see page 4.

Source: Dun & Bradstreet
Key Business Ratios 1980
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PRODUCTION

The latest available information on production of selected types of men's furnishings items is contained in the Current Industrial Report (CIR) 1979 annual report on apparel issued by the Census Bureau. The CIR information is based on a sample of apparel manufacturers and thus is not as comprehensive as the census of manufactures conducted at five-year intervals. However, the CIR indicates industry trends.

Excluded from the CIR apparel survey are many small apparel firms which are included in the census of manufactures, where data is obtained for these firms from administrative records of other government agencies. In the 1977 census, these firms accounted for 6% of the total value of shipments in the men's and boys' shirts and nightwear industry, 2% in the men's and boys' underwear industry and 1% in knit underwear mills.

According to the 1979 CIR on apparel, men's dress and business shirt production declined 3.2% in 1979 compared to 1978. All reported categories of men's underwear and nightwear experienced production declines in 1979 except men's lightweight undershirts, which rose 1.0%. The biggest production decline was in the men's boxer shorts classification, which dipped 12.4% to 72 million units in 1979 compared to 82.1 million units in 1978.

Men's hosiery production, as reported by the National Association of Hosiery Manufacturers, fell 5.5% in 1979 to 866 million pairs.

PRODUCTION

Production of Reported Types of Men's Furnishings By Type of Fabric & Construction, 1977-1979

	Production (Thous. Units) 1979	1978	1977	% Change 1979/1978	% of Category 1979
Men's dress & business shirts, incl. uniform	94,416	97,500	110,712	- 3.2%	100.0%
By fabric:					
All cotton and chiefly cotton	24,216	22,380	25,656	+ 8.2	25.6
All man-made and chiefly man-made	69,888	74,628	74,160	- 6.3	74.0
All other fabric, incl. fabric, n.s.k.	312	492	10,896	-36.6	0.3
By construction:					
Woven fabric	76,968	73,236	78,720	+ 5.1	81.5
Knit fabric	14,076	21,264	25,236	-33.8	14.9
Construction, n.s.k.	3,372	3,000	6,756	+12.4	3.6
Men's pajamas & other nightwear, excl. robes	17,064	18,204	21,000	- 6.3	100.0
By construction:					
Woven fabric	14,508	15,660	18,168	- 7.4	85.0
Knit fabric	2,556	2,544	1,596	+ 0.5	15.0
Construction, n.s.k.	--	--	1,236	--	--
By fabric:					
All cotton and chiefly cotton	11,940	12,288	11,580	- 2.8	70.0
All man-made and chiefly man-made	5,124	5,916	8,040	-13.4	30.0
All other fabric					
Fabric, n.s.k.	--	--	1,380	--	--
Men's and boys' robes	6,960	7,212	na	- 3.5	100.0
By construction:					
Woven fabric	5,064	4,476	na	+13.1	72.8
Knit fabric	1,896	1,536	na	+23.4	27.2
Construction, n.s.k.	na	1,200	na	--	--
By fabric:					
All cotton and chiefly cotton	2,556	2,676	na	- 4.5	36.7
All man-made and chiefly man-made	2,952	2,244	na	+31.6	42.4
Fabric, n.s.k.	1,452	2,292	na	-36.6	20.9
Woven underwear:					
Men's boxer shorts	72,000	82,152	83,640	-12.4	100.0
Cotton/polyester blended fabric	50,616	56,220	53,796	-10.0	70.3
All cotton & all other cotton blends	21,384	25,932	25,080	-17.5	29.7
All other fabric, incl. fabric, n.s.k.			4,764		

(continued)

Production of Reported Types of Men's Furnishings
By Type of Fabric & Construction, 1977-1979
(continued)

	Production (Thous. Units)			% Change	% of Category
	1979	1978	1977	1979/1978	1979
Knit underwear:					
Men's lightweight undershirts w/¼ sleeve, excl. T-shirts made for outerwear	240,600	238,212	247,008	+ 1.0	100.0%
Cotton/polyester blended fabric	78,432	87,720	105,360	-10.6	32.6
All cotton & all other cotton blends	155,640	145,632	121,284	+ 6.9	64.7
All other fabric Fabric, n.s.k.	6,528	4,860	20,364	+34.3	2.7
Men's and boys' sleeveless athletic type undershirts	37,416	40,968	43,476	- 8.7	100.0
Cotton/polyester blended fabric	10,428	13,836	na	-24.6	27.9
All cotton & all other cotton blends	21,492	20,496	na	+ 4.9	57.4
All other fabric Fabric, n.s.k.	5,496	6,636	na	-17.2	14.7
Men's and boys' thermal underwear incl. winter weight:					
Tops (i.e., undershirts)	20,388	22,068	18,252	- 7.6	100.0
Cotton/polyester blended fabric	11,604	15,012	na	-22.7	56.9
All cotton & all other cotton blends	7,920	5,520	na	+43.5	38.8
All other fabric	864	1,536	na	-43.7	4.2
Bottoms (i.e., drawers, etc.)	25,956	33,084	26,508	-21.5	27.3
Cotton/polyester blended fabric	14,646	23,820	na	-38.5	71.8
All cotton & all other cotton blends	10,224	7,776	na	+31.5	50.1
All other fabric	1,056	1,488	na	-29.0	5.2
One piece (i.e., union suits)	2,184	2,604	2,940	-16.1	10.7
Cotton/polyester blended fabric	792	1,068	na	-25.8	3.9
All cotton & all other cotton blends All other fabric	1,392	1,536	na	- 9.4	6.8
Shorts and briefs:					
Men's and boys' shorts (boxer style, supporter type, non-supporter type, etc.	4,572	4,800	3,228	- 4.8	100.0
Cotton/polyester blended fabric All cotton & all other cotton blends All other fabric	4,572 na	4,800	na	- 4.8	100.0

(continued)

Production of Reported Types of Men's Furnishings By Type of Fabric & Construction, 1977-1979

(continued)

	Production (Thous. Units) 1979	1978	1977	% Change 1979/1978	% of Category 1979
Shorts and briefs (cont'd.)					
Men's supporter-type knit briefs	255,492	229,680	210,096	+11.2	100.0%
Cotton/polyester blended fabric	78,120	86,460	79,824	- 9.7	37.6
All cotton & all other cotton blends	173,988	140,952	122,376	+23.4	75.7
All other fabric	3,384	2,268	4,788	+49.2	1.5
Fabric, n.s.k.	--	--	3,108	--	--
Hosiery, men's					
Size 10 & up; (thous. pairs)	865,956	916,560	831,960	- 5.5	100.0
Anklets	519,276	615,672	606,552	-15.7	60.0
Foot socks	4,908	4,260	2,640	+15.2	0.6
Knee	192,024	161,532	109,032	+18.9	22.2
Midcalf	149,748	135,096	113,736	+10.8	17.3

na = not available
n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel, MA-23A & National Association of Hosiery Mfgs., 1979 Hosiery Statistics.

PRODUCTION

Materials Consumed in Production

Materials Consumed in the Production of Specified Men's Furnishings, 1977

	Delivered Cost (million $)
Shirts & nightwear (SIC 2321*), total	$1,107.9
Broad woven fabrics	400.7
Purchased knitted fabrics	365.8
All other materials, containers and supplies	341.4
Underwear (SIC 2322*), total	182.3
Broad woven fabrics	30.3
Purchased knitted fabrics	112.4
All other materials, containers and supplies	39.6
Neckwear (SIC 2323*), total	93.4
Broad woven fabrics	49.5
Purchased knitted fabrics	1.8
All other materials, containers and supplies	42.1
Hosiery, n.e.c. (SIC 2252*), total	478.1
Hosiery in the griege	134.8
Cotton yarns	53.1
Nylon spun yarns	28.7
Acrylic yarns	71.7
Nylon filament yarns	42.6
Spandex filament yarns	4.8
All other yarns	29.7
All other materials, containers and supplies	112.7
Knit underwear mills (SIC 2254*), total	325.8
Purchased knitted fabrics	7.5
Carded cotton yarns	94.5
Combed cotton yarns	40.7
Man-made fiber yarns, filament and spun	34.4
All other yarns	25.7
All other materials, containers and supplies	123.0

*For a definition of these SIC codes, see page 4.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

At the beginning of 1981, monthly reports in the CIR apparel series for 1979 and 1980 were under revision based on the 1979 annual apparel report. Monthly production figures for 1980 (subject to revision) show a 2.4% decline in men's dress and business shirt cuttings compared to 1979.

PRODUCTION

Seasonality in Production

Cuttings of men's dress and business shirts for the first three months of 1980 equaled 27.9% of overall 1980 production. Monthly production figures for other furnishings items were not available.

Percent of Men's Dress & Business Shirt Cuttings By Month, 1980

Year	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1980	100.0%	10.0%	8.8%	9.1%	8.6%	8.3%	9.5%	6.1%	8.4%	8.4%	9.9%	7.1%	5.7%

Source: U.S. Bureau of the Census,
Current Industrial Report,
Men's Apparel M23B(80)-12.

SHIPMENTS

Monthly and annual data on production and value of shipments for some men's furnishings items are reported in the Current Industrial Report on apparel issued by the Census Bureau. However, the data is subject to the limitations previously noted in the Production segment of this Fact File and is not directly comparable to the broader-based 1977 census data.

According to the CIR, value of shipments of men's dress and business shirts increased 3.6% in 1979 from 1978. The largest increase from 1978 to 1979 in reported categories of men's furnishings was in men's and boys' robes, which increased 26.9% in shipment value to $62.2 million. Men's supporter-type knit briefs rose 22% in shipment value to $238.8 million from $195.8 million in 1978.

Value of Shipments of Specified Items of Men's Furnishings, 1978, 1979

	(Mil. $)		% Change
	1979	1978	1979/1978
Dress & business shirts, incl. uniform	$656.4	$633.8	+ 3.6%
Pajamas & other nightwear, excl. robes	87.7	87.3	+ 0.5
Robes*	62.2	49.0	+26.9
Boxer shorts	86.0	91.9	- 6.4
Lightweight undershirts with ¼ sleeve, excl. T-shirts made for outerwear	275.5	263.3	+ 4.6
Sleeveless athletic type undershirts*	30.5	30.1	+ 1.3
Thermal underwear, incl. winter weight*:			
Tops (i.e., undershirts)	50.7	49.5	+ 2.4
Bottoms (i.e., drawers, etc.)	62.3	72.0	-13.5
One piece (i.e., union suits)	9.2	10.3	-10.7
Shorts (boxer style, supporter type, etc.)*	4.0	4.2	- 4.8
Supporter-type knit briefs	238.8	195.8	+22.0

*Includes boys', as well as men's. Separate figures not available.

Source: U.S. Bureau of the Census,
Current Industrial Report,
Apparel, MA-23A(79)-1.

SHIPMENTS

The latest industry-wide information on quantity and value of shipments of men's furnishings comes from the 1977 Census of Manufactures. For some furnishings items such as neckwear, hats and caps and hosiery, the census provides the only shipment information available.

The 1977 census data show the value of men's hats and caps shipments rose 83.4% in the five-year period between 1972 and 1977. Over the same period, men's & boys' neckwear fell 24.3% in shipment value to $21.3 million. Polyester neckties dropped 38.3% in value and 57.5% in quantity compared to 1972.

Quantity and Value of Shipments of Specified Furnishings By All Producers, 1972, 1977

	Quantity (thous. units)		% Change	Value (mil. $)		% Change
	1977	1972	1977/1972	1977	1972	1977/1972
Dress & sport shirts	273,780	339,744	- 19.4%	$1,368.3	$1,084.9	+ 26.1%
Underwear & nightwear, total	868,536	969,384	- 10.4	925.2	696.1	+ 32.9
Made in knitting mills	459,456	546,780	- 16.0	431.0	360.3	+ 19.6
Made in cut-and-sew shops	409,080	422,604	- 3.2	494.2	335.8	+ 47.2
Underwear	372,576	380,352	- 2.0	341.4	230.5	+ 48.1
Nightwear	36,504	42,252	- 13.6	152.8	105.3	+ 45.1
Neckwear, total	na	na	--	211.3	279.3	- 24.3
Neckties, woven fabrics, incl. prints	na	143,952	--	125.0	222.6	- 43.8
All silk	5,760*	10,944	- 47.4	25.8	26.6	- 3.0
All rayon and/or acetate	(S)	23,148	--	5.1	26.8	- 81.0
All polyester	34,440	81,072	- 57.5	81.9	132.7	- 38.3
All other fabrics, incl. blends	(S)	28,788	--	12.2	36.5	- 66.6
All other men's & boys' neckwear, incl. knit neckties & knit or woven mufflers and scarves	2,832**	7,776	- 63.6	8.8	9.5	- 7.4
Neckwear, n.s.k.	na	na	--	77.5	47.2	+ 64.2
Hats & caps, total	na	na	--	270.5	147.5	+ 83.4
Hats & hat bodies, except cloth & millinery	na	na	--	66.5	44.4	+ 49.8
Finished straw hats, except harvest hats, men's & boys'	5,100	4,584	+ 11.3	16.6	9.6	+ 72.9
Wool-felt finished hats, except millinery	4,524	4,932	- 8.3	14.9	8.4	+ 77.4
Fur-felt finished hats, except millinery	1,188	3,444	- 65.5	19.8	20.1	- 1.5
Hat bodies, except those finished in the same plant	3,504	3,060	+ 14.5	12.9	5.4	+138.9
Hats & hat bodies, except cloth & millinery, n.s.k.	na	na	--	2.3	0.9	+155.6

(continued)

Quantity & Value of Shipments of Specified Furnishings
By All Producers, 1972, 1977
(continued)

	Quantity (thous. units)		% Change	Value (mil. $)		% Change
	1977	1972	1977/1972	1977	1972	1977/1972
Hats & caps, total (cont'd.)						
Cloth hats & caps	88,976	56,576	+ 57.3%	$135.4	$ 54.9	+146.6%
Cloth hats, except uniform	10,308	17,688	- 41.7	26.9	22.8	+ 18.0
Caps, except uniform	78,768	36,888	+113.5	108.5	32.1	+238.0
Cloth hats & caps, n.s.k.	na	na	--	4.9	1.9	+157.9
Hats & caps, n.s.k.	na	na	--	27.4	19.2	+ 42.7
All other hats & caps, incl. harvest hats, women's uniform hats & caps, head wear from purchased fur on skin, etc.	24,468	15,600	+ 56.8	21.3	10.5	+102.9
Men's hosiery (size 10 & up, total*** (thous. pairs)	1,315,164	1,008,936	+ 30.3	587.8	376.0	+ 56.3
Men's finished seamless hosiery	970,200	696,960	+ 39.2	136.3	83.5	+ 63.2
Anklets, incl. crew & athletic socks, etc.	758,640	545,160	+ 39.1	358.3	218.2	+ 64.2
Cotton and/or wool	301,560	247,560	+ 21.8	136.3	83.5	+ 63.2
Man-made	457,080	297,600	+ 53.6	222.0	134.7	+ 64.8
Midcalf, incl. half-hose	88,308	95,136#	- 7.2	43.9	43.0	+ 2.1
All other, incl. foot socks (knee, bermuda, campus, etc.)	116,160	39,840	+191.6	59.1	17.8	+232.0
Men's finished seamless hosiery, n.s.k.	7,092	16,824##	- 57.8	3.3	6.9	- 52.2
Men's seamless hosiery, all types, shipped in the griege	192,876	206,208	- 6.5	62.0	55.3	+ 12.1

na = not available
n.s.k. - not specified by kind.
(S) = Withheld by the Census Bureau because the estimate did not meet publication standards.
* 10-19% of this total has been estimated by the Census Bureau.
** 20-29% of this total has been estimated by the Census Bureau.
# 10-30% of this total has been estimated by the Census Bureau.
## Entire quantity has been estimated by the Census Bureau.
*** Hosiery data includes substantial duplication. Value of hosiery shipped in the griege is, in effect, counted twice, once as a shipment of the establishment producing griege goods to dyeing and finishing plants, and again in finished hosiery shipped by dyeing and finishing plants.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

SHIPMENTS

Shipments By Region

Among the seven men's & boys' furnishings categories for which 1977 value of shipments were broken down by geographic area by the Census Bureau, the Middle Atlantic Division - and specifically Pennsylvania - was the only geographic region mentioned in all categories. The South Atlantic division was an important shipping region for six of the seven furnishings items.

States mentioned most frequently as shipment leaders in the designated categories were Pennsylvania and New York (Middle Atlantic division), Georgia, North Carolina and South Carolina (South Atlantic division), Alabama (East South Central division), and Texas (West South Central division).

Value of Shipments of Specified Furnishings By All Producers By Geographic Area, 1972, 1977

	Value of Shipments (Mil. $)		% Change
	1977	1972	1977/1972
Dress & sport shirts, United States, total	$1,344.6	$1,069.5	+ 25.7%
Middle Atlantic Division:			
New York	218.9	192.6	+ 13.6
New Jersey	16.8	40.0	- 58.0
Pennsylvania	81.6	87.9	- 7.2
South Atlantic Division:			
Maryland	19.2	na	--
North Carolina	69.4	73.6	- 5.7
South Carolina	67.5	57.1	+ 18.2
Georgia	137.7	120.3	+ 14.5
Florida	15.9	6.1	+160.7
East South Central Division:			
Kentucky	47.6	na	--
Tennessee	158.3	112.1	+ 41.2
Alabama	119.1	112.5	+ 5.9
Mississippi	33.4	23.6	+ 41.5
West South Central Division:			
Texas	15.9	3.2	+396.9
Pacific Division:			
California	140.0	44.8	+212.5
Hawaii	9.1	na	--
Nightwear, United States, total	152.8	105.3	+ 45.1
Middle Atlantic Division:			
New York	65.2	37.7	+ 72.9
Pennsylvania	18.9	na	--
South Atlantic Division:			
South Carolina	14.7	55.0	- 73.3

(continued)

Value of Shipments of Specified Furnishings By All Producers by Geographic Area, 1972, 1977 (continued)

	Value of Shipments (Mil. $)		% Change
	1977	1972	1977/1972
Knit & woven underwear			
United States, total	$ 341.4	$ 230.5	+ 48.1%
Middle Atlantic Division:			
New York	18.6	na	na
Pennsylvania	13.5	na	na
South Atlantic Division:			
South Carolina	26.8	na	na
Georgia	29.4	na	na
East South Central Division:			
Alabama	14.4	na	na
Knit underwear & nightwear			
United States, total	431.0	360.3	+ 19.6
Middle Atlantic Division:			
New York	14.8	na	--
Pennsylvania	95.8	107.6	- 11.0
South Atlantic Division:			
North Carolina	72.9	na	--
East South Central Division:			
Mississippi	24.6	na	--
Men's finished seamless hosiery			
United States, total	464.6	285.9	+ 62.5
Middle Atlantic Division:			
Pennsylvania	29.1	na	--
South Atlantic Division:			
North Carolina	169.9	110.5	+ 53.8
Georgia	17.4	na	--
East South Central Division:			
Tennessee	40.6	41.1	- 1.2
Alabama	18.2	na	--
Hats & hat bodies, except cloth & millinery			
United States, total	66.4	44.4	+ 49.5
Middle Atlantic Division:			
New York	4.2	na	--
Pennsylvania	13.4	9.8	+ 36.7
West South Central Division:			
Texas	25.6	na	--
Cloth hats & caps, United States, total	176.6	83.9	+110.5
Middle Atlantic Division:			
New York	22.8	13.3	+ 71.4
New Jersey	2.6	1.7	+ 52.9
Pennsylvania	20.2	4.5	+348.9

(continued)

SHIPMENTS

Value of Shipments of Specified Furnishings By All Producers By Geographic Area, 1972, 1977 (continued)

	Value of Shipments (Mil. $) 1977	Value of Shipments (Mil. $) 1972	% Change 1977/1972
Cloth hats & caps (continued)			
East North Central Division:			
Wisconsin	$ 5.4	$ na	--
West North Central Division:			
Minnesota	2.6	na	--
Missouri	48.9	22.3	+119.3%
South Atlantic Division:			
Virginia	11.3	4.7	+140.4
West South Central Division:			
Texas	9.1	9.9	- 8.1
Pacific Division:			
California	2.2	na	--

na = not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCER PRICES

Producer prices for men's wear rose an average 7.7% in 1980 over 1979. Of the specified men's furnishings items, producer prices for men's pajamas & other nightwear rose the least (2.4%) while the largest increase was in men's briefs (8.7%). In the two year period between 1978 and 1980, men's dress and business shirts increased 19.8% at the wholesale level.

PRODUCER PRICES

Producer Prices for Specified Men's Furnishings, 1978-1980
(Dec. 1977 = 100 unless otherwise indicated)

	Annual Averages			% Change	
	1980(p)	1979	1978	1980/ 1979	1980/ 1978
All men's wear (1967 = 100)	200.3	186.0	176.1	+7.7%	+13.7%
Dress & business shirts	120.2	114.2	100.3	+5.2	+19.8
Pajamas & other nightwear (1967 = 100)	214.9	209.9	199.4	+2.4	+ 7.8
Briefs	114.3	105.1	101.5	+8.7	+12.6
Socks	122.3	113.5	104.1	+7.7	+17.5
Ties (1973 = 100)	118.4	111.9	107.6	+5.8	+10.0
Hats & caps	118.7	110.0	104.8	+7.9	+13.3

(p) = preliminary

Source: U.S. Dept. of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports

Compared with 1978, imports of specified men's furnishings rose 9.9% in value in 1979 although the quantity imported declined 0.2%, according to the U.S. Department of Commerce. Men's and boys' pajamas and other nightwear, the largest import category covered in terms of value, increased 23.6% in dollars and 13.6% in units in the 1979 period.

Over the first nine months of 1980, the quantity of specified men's and boys' furnishings imported decreased 14.1% from the same nine months in 1979 but their import value was 5.6% higher. The largest increase in this period was in men's and boys' dressing gowns of man-made fibers (not knit), which rose 115.8% in import value and 712.7% in quantity

FOREIGN TRADE

Imports

Quantity & Value of Imports of Specified Furnishings By Leading Countries of Origin, 1978, 1979

	Quantity (dozens)		% Change	C.I.F. Value (thous. $)		% Change
	1979	1978	1979/1978	1979	1978	1979/1978
Furnishings, reported categories, total	4,337,618	4,345,657	- 0.2%	$130,610	$118,819	+ 9.9%
Dress shirts, cotton, not knit	778,376	771,836	+ 0.8	44,306	39,168	+ 13.1
Hong Kong	470,881	460,089	+ 2.3	27,454	22,659	+ 21.2
India	128,081	132,121	- 3.1	5,450	5,021	+ 8.5
Work shirts, cotton, not knit	249,761	299,095	- 16.5	7,697	8,405	- 8.4
Mainland China	64,920	46,791	+ 38.7	1,691	1,232	+ 37.3
Hong Kong	57,175	110,345	- 48.1	1,944	3,286	- 40.8
Pajamas & other nightwear, not knit	853,389	751,257	+ 13.6	31,934	25,827	+ 23.6
Cotton	614,772	531,797	+ 15.6	23,534	18,836	+ 24.9
Hong Kong	270,167	315,596	- 14.4	10,528	11,364	- 7.4
Dominican Republic	153,964	68,730	+124.0	5,706	2,340	+143.8
Man-made fibers	238,617	219,460	+ 8.7	8,400	6,991	+ 20.1
Dominican Republic	176,065	155,780	+ 13.0	6,006	5,108	+ 17.6
Dressing gowns, not knit	94,707	119,182	- 20.5	7,487	10,218	- 26.7
Wool	1,425	2,102	- 32.2	361	404	- 10.6
India	700	--	--	170	--	--
Man-made fibers	5,182	7,747	- 33.1	261	482	- 45.8
Cotton	88,100	109,333	- 19.4	6,865	9,332	- 26.4
Taiwan	27,157	31,691	- 14.3	971	1,064	- 8.7
Dominican Republic	16,318	13,469	+ 21.1	1,734	1,246	+ 39.2
Undergarments, nspf	na	na	--	9,948	7,255	+ 37.1
Textile material, not knit	na	na	--	551	435	+ 26.7
Nicaragua	na	na	--	447	200	+123.5
Textile materials, knit	1,103,696	852,403	+ 29.5	9,397	6,820	+ 37.8
Hong Kong	482,239	336,315	+ 43.4	2,352	1,286	+ 82.9
Mexico	353,757	176,663	+100.2	3,196	1,547	+106.6
T-shirts, cotton, not knit	919,380	1,186,747	- 22.5	11,27[illegible]	13,002	- 13.3
Pakistan	408,084	494,400	- 17.5	2,387	2,762	- 13.6
Poland	113,440	160,500	- 29.3	1,211	1,400	- 13.5
Neckties, textile materials	319,840	333,141	- 4.0	15,577	12,331	+ 26.3
Italy	212,102	207,123	+ 2.4	9,122	6,996	+ 30.4
England	23,931	36,186	- 33.9	1,536	1,680	- 8.6

(continued)

FOREIGN TRADE

Imports

Quantity & Value of Imports of Specified Furnishings By Leading Countries of Origin, 1978, 1979
(continued)

	Quantity (dozens)		% Change	C.I.F. Value (thous. $)		% Change
	1979	1978	1979/1978	1979	1978	1979/1978
Headwear, fur not on the skin	18,469	31,996	- 42.3%	$ 2,385	$ 2,613	- 8.7%
Portugal	5,233	13,302	- 60.7	347	455	- 23.7
Italy	3,428	3,358	+ 2.1	472	596	- 20.8

*C.I.F. value represents the value of imports at the first port of entry in the U.S. It is based on the purchase price and includes all freight, insurance, and other charges (excluding U.S. export duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

nspf = not specially provided for.
na = not available.

Source: U.S. Bureau of the Census,
U.S. General Imports FT 135,
Dec. 1979 and 1978.

Exports

U.S. exports of specified men's & boys' furnishings were valued at $56.8 million in 1979, up 33.8% over the 1978 export value of $42.4 million. Quantity of furnishings exports rose 28.4% over the same period. Men's and boys' cotton hosiery, an export category not reported in 1978, is not included in the above totals. In 1979, the export value of this category was $5.6 million from 912,000 dozen pairs exported.

Men's & boys' dress shirts rose 46.5% in export value. Robes and dressing gowns exported showed the largest percentage increase in value of any category reported in 1979 compared to 1978. Pajamas and other nightwear decreased 1% from their 1978 value, the biggest decline among the categories.

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Furnishings, 1978, 1979

	Quantity (dozens)		% Change	F.A.S. Value* (thous.$)		% Change
	1979	1978	1979/1978	1979	1978	1979/1978
Furnishings, reported categories, total	2,977,364	na	--	$62,428	na	--
Dress shirts, not knit	327,024	196,203	+ 66.7%	8,597	$ 5,867	+ 46.5%
Cotton	183,501	95,609	+ 91.9	4,432	2,710	+ 63.5
Man-made	143,523	100,594	+ 42.7	4,165	3,157	+ 31.9
Work shirts, not knit	128,969	96,378	+ 33.5	2,397	1,912	+ 25.4
Cotton	61,264	33,645	+ 82.1	1,598	1,083	+ 47.5
Man-made	67,432	62,733	+ 7.5	799	829	- 3.6
Dress & work shirts, knit	114,966	111,826	+ 2.8	4,501	4,535	- 0.8
Cotton	43,148	39,638	+ 8.8	2,371	2,194	+ 8.1
Man-made	71,818	72,188	- 0.5	2,130	2,341	- 9.0
Robes & dressing gowns, not knit	203,578	88,314	+130.5	4,254	1,673	+154.3
Cotton	193,645	81,322	+138.1	3,895	1,419	+174.5
Wool	3,988	912	+337.3	155	38	+307.9
Man-made	5,945	6,080	- 2.2	204	216	- 5.6
Pajamas & other nightwear, total	373,657	470,849	- 20.6	10,117	10,223	- 1.0
Not knit	65,417	121,855	- 46.3	1,667	1,616	+ 3.2
Cotton	17,432	52,877	- 67.0	577	690	- 16.4
Wool	5,974	2,240	+166.7	139	159	- 12.6
Man-made	37,607	52,442	- 28.3	870	603	+ 44.3
Other textile material	4,404	14,296	- 69.2	81	164	- 50.6
Knit	308,240	348,994	- 11.7	8,450	8,607	- 1.8
Cotton	282,759	314,421	- 10.1	7,590	8,239	- 7.9
Man-made	6,535	2,846	+129.6	235	110	+113.6
Wool	17,394	3,491	+398.2	556	102	+445.1
Other textile material	1,552	28,236	- 94.5	69	156	- 55.8
Underwear, total	936,596	820,882	+ 14.1	9,147	8,439	+ 8.4
Underwear, briefs, drawers, undershorts	710,621	588,318	+ 20.8	6,966	5,859	+ 18.9
Not knit	382,706	295,768	+ 29.4	2,317	1,880	+ 23.2
Cotton	72,092	129,182	- 44.2	626	993	- 37.0
Man-made	310,614	166,586	+ 86.5	1,691	887	+ 90.6
Knit	327,915	292,550	+ 12.1	4,649	3,979	+ 16.8
Cotton	287,761	241,241	+ 19.3	4,104	3,330	+ 23.2
Man-made	40,154	51,309	- 21.7	545	649	- 16.0
Underwear, other than briefs, drawers & undershorts	201,604	189,283	+ 6.5	1,827	2,034	- 10.2
Not knit	150,407	133,944	+ 12.3	721	793	- 9.1
Cotton	45,158	47,048	- 4.0	291	393	- 25.9
Man-made	105,249	86,896	+ 21.1	430	400	+ 7.5

(continued)

Exports

Quantity & Value of Exports of Specified Furnishings, 1978, 1979
(continued)

	Quantity (dozens) 1979	Quantity (dozens) 1978	% Change 1979/1978	F.A.S. Value* (thous.$) 1979	F.A.S. Value* (thous.$) 1978	% Change 1979/1978
Underwear (continued)						
Knit	51,197	55,339	- 7.5%	$ 1,106	$ 1,241	- 10.9%
Cotton	32,897	41,289	- 20.3	922	1,065	- 13.4
Underwear, nspf of textile material not specified	24,371	43,281	- 43.7	354	546	- 35.2
Not knit	5,527	7,970	- 30.6	84	110	- 23.6
Knit	18,844	35,311	- 46.6	270	436	- 38.1
T-shirts, all white, knit	825,223	403,597	+104.5	16,611	8,657	+ 91.9
Cotton	762,631	376,353	+102.6	14,909	7,967	+ 87.1
Man-made	62,592	27,244	+129.7	1,702	690	+146.7
Neckties, textile materials	91,280	149,514	- 38.9	1,157	1,115	+ 3.8
Not knit	72,501	115,947	- 37.5	921	868	+ 6.1
Knit	18,779	33,567	- 44.0	236	247	- 4.4
Hosiery, cotton (dozen pairs)	912,004	nr	--	5,647	nr	--

nspf = not specially provided for.
nr = not reported.
na = not available.

*F.A.S. value is the value at the U.S. port of export, based on the transaction price including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance, and any other charges or transportation costs beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. General Exports FT 410,
December 1979 and 1978.

THE POTENTIAL MARKET FOR MEN'S FURNISHINGS

Male Population of the U.S., 1979 & Projections* to 2000
(Thousands of Males)

	1979	1985	2000	% Change 2000/1979	Percent of Male Population 1979	1985	2000
Total, all ages	107,457	113,366	126,558	+17.8%	100.0%	100.0%	100.0%
Under 16 years	27,724	28,288	31,296	+12.9	25.8	25.0	24.7
16 years & over	79,733	85,078	95,291	+19.5	74.2	75.0	75.3
16-19 years	8,548	7,290	7,993	- 6.5	8.0	6.4	6.3
20-34 years	27,837	30,142	25,662	- 7.8	25.9	26.6	20.3
35-49 years	17,749	20,976	29,556	+66.5	16.5	18.5	23.3
50-64 years	15,582	15,659	19,364	+24.3	14.5	13.8	15.3
65 years & over	10,017	11,013	12,716	+26.9	9.3	9.7	10.0
Median age in years	28.8	30.3	34.1				

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, Nos. 714 (July 1977) &
870 (Jan. 1980).

Between 1979 and 1985, the Census Bureau forecasts an 18.2% increase in the number of males aged 35-49 years in the U.S. By the year 2000, it is expected that this age group will be 67.1% larger than in 1979 and represent 23.3% of the total male population. Older age groups (50-64 years, 65 years and over) are also expected to increase significantly in numbers during these years.

These statistics show more American males entering their prime earnings years, where their earnings will be at their peak. This is good news for manufacturers of men's furnishings because the corresponding increase in personal disposable income for these males will surely spurt sales of these items upwards.

RETAIL SALES

The men's furnishings classification encompasses a great variety of products, including shirts, neckwear, underwear, nightwear, etc., which are sold in different types of retail outlets. This diversity, plus the fact that some items, such as certain types of shirts, might be classified as sportswear rather than furnishings, and other items are considered by some stores as accessories, separate from furnishings, make it difficult to report an accurate estimate on the total value of men's furnishings at the retail level.

Total personal consumption expenditures for all men's wear in 1979 amounted to about $28.6 billion, based on Department of Commerce data, of which it appeared that men's furnishings (not including jewelry or such accessories as small leather goods) accounted for close to $10 billion, with breakdowns estimated as follows:

(continued)

Estimated Expenditures For Men's Furnishings, 1979
(Millions of Dollars)

Shirts (dress, sport, work)	$4,400
Underwear	1,325
Nightwear, robes	390
Hosiery	750
Hats, caps	600
Gloves, mittens	230
Other, including neckwear, belts, etc.	2,000

Current Sales Trends

Dress Shirts: Sales of men's dress shirts in 1980 were buoyed by the recession/inflation-induced reluctance of men to purchase new suits. Shirts, as well as other furnishings items, were bought to liven up an old wardrobe rather than buy more expensive clothing. In 1979, dress shirt sales reached approximately $1.5 billion. Nearly 80% of woven dress shirts were purchased at $12.25 and under that year.

Underwear: Consumer acceptance of fashion underwear, with its emphasis on styling and coloration, has helped boost overall men's underwear sales to an estimated $1.3 billion in 1979. Almost 20% of underwear sales in department and specialty stores during 1980 was derived from fashion underwear, and the trend is expected to continue in 1981. (Daily News Record January 5, 1981). Reasons cited by retailers for the popularity of fashion underwear include increased fashion consciousness on the part of men, their continued interest in health and fitness and improved display and packaging ideas for the product.

Nightwear: Retailers expect 1981 to be another good year for sales of men's nightwear and loungewear. In 1980, nightshirts helped to revitalize the men's sleepwear category because they appeal to a younger customer who had previously been sales resistant to traditional sleepwear. Sales of pajamas and robes were $390 million in 1979. Sales gains of 25% or more in robes were reported by retailers for 1980. Increased leisure time spent at home, and the energy crisis are two major reasons for the sales appeal of warm, comfortable nightwear/loungewear.

Neckwear: Fall 1980 sales of men's neckwear rose 20%-35% above fall 1979 sales, according to a survey by Daily News Record (December 3, 1980) of department and specialty stores. Traditional and classic ties, such as repp stripes, foulards and clubs, and ties made from natural fibers (primarily silks and wools), were the most popular neckwear items. Consumer demand for quality ties which will last a long time is creating little or no price resistance up to a $15 price point, say retailers in the survey.

Hosiery: In 1979 the sale of 620 million pairs of men's hosiery were valued at retail at $720 million, a record figure for men's hosiery. Sales gains are primarily due to the dramatic increase in sales of athletic/active socks, which now account for almost 24% of men's hosiery sales. The National Association of Hosiery Manufacturers estimated 1979 per capita consumption of men's socks at 10.5 pairs, up from 9.7 pairs in 1975.

(continued)

RETAIL SALES

Current Sales Trends

Headwear: As men gain more fashion-consciousness, sales of headwear benefit. The Headwear Institute of America projects 1980 sales to be almost $1 billion, an impressive rise from sales of $300 million in 1974. Western hats were among the most popular styles in 1980 and are expected to sell well in 1981, with some retailers insisting this style will become a classic. Headwear trends in 1981 are towards traditional downbrims and fashion straw hats.

Other items, such as jewelry, small leather goods, etc., are considered to be accessories by some stores and information about them may be found in a Fact File covering Fashion Accessories (Men's and Women's). Additional information on the hosiery industry is included as part of the Bodywear, Legwear/Hosiery (Men's, Women's and Children's) Fact File. Men's sport shirts are covered extensively in the Men's Sportswear, Casual Wear, Jeans and Active Wear Fact File.

RETAIL SALES BY STORE TYPE

The 1977 Census of Retail Trade contains the only official information available on sales of specified men's furnishings in various types of stores with payrolls. Not all store types broke out their sales in detail, but the following information reflects sales in the major outlet types. (Comparative figures for earlier years are not available due to change in the merchandise classification system.)

Shirts

Sales of men's dress and sport shirts reported by leading outlet types came to a total of $2.6 billion in 1977. Department stores accounted for the major share, 50.9%.

Reported Sales of Men's Dress & Sport Shirts (Woven)
By Store Type, 1977
(Includes only stores with payroll)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's dress & sport shirts	42,404	100.0%	$2,625.2	100.0%
Department stores**	7,702	18.2	1,336.3	50.9
Men's wear stores	16,894	39.8	798.4	30.4
Family clothing stores	12,578	29.7	412.2	15.7
Other (women's ready-to-wear stores, men's shoe stores, mail order houses)	5,230	12.3	78.3	3.0

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Shirts (continued)

Sales of men's novelty shirts, T and knit shirts by the major types of outlets reporting sales came to a total of $712.1 million in 1977. It should be noted that these items are also sold in variety stores, drug stores, supermarkets and other outlet types for which information is not available.

Reported Sales of Men's Novelty/Knit Shirts By Store Type, 1977
(Includes only stores with payroll)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's novelty/knit shirts	23,241	100.0%	$712.1	100.0%
Department stores**	3,893	16.7	373.9	52.5
Men's wear stores	9,490	40.8	223.4	31.4
Family clothing stores	6,575	28.3	100.9	14.2
Mail order houses	3,283	14.1	13.9	1.9

(See footnotes on preceding table.)

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

Hosiery, Pajamas, Underwear

Leading store types sold a total of $1.4 billion worth of men's hosiery, pajamas and underwear in 1977. Department stores accounted for almost two-thirds of the reported total, which does not cover outlet types not listed below, such as supermarkets, drug stores, variety stores, etc.

Reported Sales of Men's Hosiery, Pajamas & Underwear
By Store Type, 1977
(Includes only stores with payroll)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's hosiery, pajamas & underwear	36,570	100.0%	$1,370.0	100.0%
Department stores**	6,943	19.0	902.8	65.9
Men's wear stores	12,300	33.6	203.5	14.9
Family clothing stores	9,372	25.6	190.5	13.9
Family shoe stores	3,105	8.5	28.0	2.0
Men's shoe stores	517	1.4	3.7	0.3
Mail order houses	3,572	9.8	31.8	2.3
Women's ready-to-wear stores	761	2.1	9.7	0.7

(See footnotes for table on men's dress & sport shirts.)

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Sales Contribution To Total Men's & Boys' Wear Business

Percent of Total Men's & Boys' Wear Sales Accounted For By Specified Men's Furnishings In Key Store Types Reporting Sales, 1977

	Total Men's & Boys' Wear Sales* Mil. $	% of Total Accounted For By Men's: Dress & Sport Shirts	Novelty/ Knit Shirts	Hos., pj's, Underwear
Department stores	$10,574.9	12.6%	3.5%	8.5%
Men's wear stores	6,275.4	12.7	3.6	3.2
Family clothing stores	3,001.5	13.7	3.4	6.3

Source: Based on U.S. Bureau of the Census, Census of Retail Trade, 1977.

Men's Wear Stores

Men's Wear Stores By Sales Size of Stores, 1977

	Stores		Sales	
	No.	% of Total	Mil. $	% of Total
Total establishments:	20,349	100.0%	$6,563.1	100.0%
Annual sales volume:				
Less than $100,000	5,018	24.7	257.2	3.9
$100,000-499,999	12,027	59.1	2,948.5	44.9
$500,000-999,999	2,307	11.3	1,587.7	24.2
$1 million - 1,999,999	779	3.8	1,036.6	15.8
$2 million & over	218	1.1	733.0	11.1

*Covers establishments in SIC 561 primarily selling men's & boys' ready-to-wear clothing & furnishings. Includes only establishments operated entire year.

Source: U.S. Bureau of the Census, Census of Retail Trade, 1977, Establishment & Firm Size, RC77-S-1.

Sales of All Men's Wear Stores, 1977-1980

	1980(p)	1979	1978(r)	1977	% Change 1980/ 1979	1980/ 1977
Total sales (mil. $)	$8,176	$7,830	$7,503	$6,943.2	+4.4%	+17.8%
No. of Stores	na	na	na	22,683	--	--

(p) = preliminary
(r) = revised.

Source: U.S. Bureau of the Census, Current Business Reports, 1979 Retail Trade; 1977 Census of Retail Trade RC77-A-52.

RETAIL SALES BY STORE TYPE

Men's Wear Stores

Men's furnishings sales accounted for a median 19.4% of total sales in men's specialty stores in 1979, according to Menswear Retailers of America. The average initial markup for men's furnishings in these stores was a median 50.9%. A typical men's specialty store increased sales by 2.4% over 1978.

Sales of men's neckwear increased a typical 7.5% in 1979 over 1978. Median sales of men's underwear and sleepwear declined from 1978 levels in men's specialty stores.

Selected 1979 Merchandising & Operating Results in Men's Wear Stores
(Median Results)

	Men's					
	Dress Shirts	Neckwear	Hosiery	Underwear	Sleepwear	Headwear
% change in sales from last year (83)*	+ 4.9%	+ 7.5%	+ 3.5%	- 1.5%	- 2.5%	+ 5.2%
% of total store sales (102)*	6.5	2.8	1.0	1.2	0.8	0.6
% of men's furnishings sales (102)*	40.0	18.2	5.6	8.6	5.2	4.2
% distribution of average inventory in men's furnishings dept. (49)*	39.5	11.9	5.3	10.1	6.3	4.6
Markdowns, % of men's furnishings sales (63)*	9.2	9.2	3.0	2.8	4.1	9.3
Number of stock turns (49)*	1.8	2.6	2.3	1.5	1.6	1.7

*Number in parenthesis refers to the number of reporting firms in each category.

Source: Menswear Retailers of America,
1979 Annual Business Survey.

Department Stores

Profile of Department Stores (SIC 531), 1977

Sales Size of Stores	Stores		Sales	
	Number	%	Thous. $	%
Total all stores*	8,807		$76,909,452	
Stores operated entire year with annual sales of	8,401	100.0%	75,590,405	100.0%
$5 mil. & over	4,995	59.5	65,269,516	86.4
$2 mil. - $4.9 mil.	2,794	33.2	9,406,059	12.4
Under $2 million	612	7.3	914,731	1.2

*Each business location is counted as a separate store. Includes discount department stores and department store outlets of mail order chains as well as traditional department stores.

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade,
Establishment & Firm Size,
RC 77-S-1.

RETAIL SALES BY STORE TYPE

Department Stores

According to the National Retail Merchants Association, men's furnishings sales in department stores with total sales over $1 million rose a median 5.6% in 1979 from the year before. Typical sales per square foot of selling space were much higher for men's furnishings than for the entire upstairs store in general.

Sales of men's ties increased a median 7.8% in 1979, while dress shirt sales rose 7.1%.

Selected 1979 Merchandising & Operating Results of Men's Furnishings In Department Stores With Sales Over $1 Million
(Median Results)

	Total Upstairs Store (143)*	Adult Male Apparel (137)*	Men's Furnishings (117)*	Men's Dress Shirts (31)*	Men's Ties (26)*
Net sales, % change from last year	+ 5.5%	+ 5.6%	+ 5.6%	+ 7.1%	+ 7.8%
Sales, % of merchandise division	--	100.0	49.1	10.6	3.6
Sales, % of total store	89.2	9.0	4.5	1.0	0.3
$ sales per square foot of selling space (main or largest selling unit)	$91.6	$130.5	$141.4	$130.7	nr
Cumulative markon, %	48.0%	49.9%	50.0%	48.5%	53.0%
Gross margin, % of sales (incl. cash discounts)	42.2	42.3	45.5	44.1	53.1
Markdowns, % of retail sales	13.2	12.6	9.8	10.6	5.8
Number of stock turns	3.1	2.7	3.1	2.9	3.6
Selling salaries, % of sales (main or largest selling unit)	7.7%	7.1%	6.8%	6.9%	nr
Sales promotion costs, % of sales	3.0	2.9	3.0	4.2	nr

nr = not reported.
*Number in parenthesis refers to the number of reporting stores in each category.
**Men's furnishings include sport shirts, sweaters, vests, dress shirts, hosiery, pajamas, robes and underwear.

Source: National Retail Merchants Association,
1979 Merchandising & Operating Results,
1980 Edition.

RETAIL SALES BY STORE TYPE

Department Stores

Seasonal Patterns in Sales of Men's Furnishings & Hat Departments
(Five Year Average*)

Month	Percent of Total Sales
January	4.7%
February	4.7
March	5.1
April	5.6
May	6.5
June	9.7
July	5.8
August	5.3
September	5.9
October	7.3
November	11.5
December	27.9
Five year average	100.0%

*Based on Federal Reserve Board Figures (1961-1965) (Latest available).

Source: Newspaper Bureau of Advertising.

CONSUMER PRICES

The consumer price index for men's furnishings and special clothing (uniforms, etc.) rose 9.3% in 1980 compared to the annual 1979 average. Although this figure was considerably higher than the 4.4% annual increase for all men's wear, it was lower than the over-all increase in the CPI of 12.4%.

Consumer Price Index for Specified Men's Furnishings, 1978-1980
(Index for All Urban Consumers)
(December 1977 = 100)

	Annual Averages			% Change	
	1980(p)	1979	1978	1980/ 1979	1980/ 1978
All men's wear	106.0	101.5	99.9	+4.4%	+ 6.1%
Men's furnishings & special clothing	118.4	108.3	101.8	+9.3	+16.3
Men's shirts (dress & sport)	113.7	104.9	100.8	+8.4	+12.8

(p) = preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics

RETAIL ADVERTISING PATTERNS BY MONTH

Dress Shirt Retail Advertising
Percent of Year's Total Newspaper Linage Used Each Month
(Five-year Average, 1971-1975)

Month	Dress Shirts 1971-1975
January	5.5%
February	6.1
March	8.2
April	7.8
May	7.5
June	13.4
July	5.0
August	6.4
September	6.8
October	8.5
November	10.7
December	14.1
Total linage	100.0%

Source: The Advertising Checking Bureau, Inc.—Neustadt Reports Div. (based on retail newspaper advertising linage in 7 markets: Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles and Washington, D.C.)

CONSUMER BUYING HABITS

The following tables on specified men's furnishings items have been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc. They are based on the findings from an on-going monthly panel diary, tracking the purchases of 6,500 nationally representative families. (Note that "singles" —with their own households—are not included. The data includes purchases made for men 17 years of age and over.)

Dress Shirts

Percent of Purchases by Type of Outlet, 1980

	% of Units	% of Dollars
Total dress shirt purchases	100.0%	100.0%
Department stores	30.4	33.7
National chains	24.7	19.9
Discount stores (incl. K mart)	19.8	14.9
Men's specialty stores	17.1	24.3
Other outlets	6.4	7.3
Not reported	1.1	1.5

Percent of Purchases by Price Points, 1980

	% of Units	% of Dollars
Total dress shirt purchases	100.0%	100.0%
Less than $8.00	45.5	24.9
$8 - $15.99	42.8	49.9
$16 - $23.99	9.8	18.8
$24 & over	2.0	6.3
Sold at:		
Regular price	35.6	46.7
Sale price	61.0	49.6
Not reported	3.4	3.7

Percent of Purchases by Month, 1980

Dress Shirt	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	7.9%	5.4%	6.2%	7.5%	5.9%	9.7%	7.9%	8.0%	5.5%	6.1%	11.6%	18.2%	100.0%
Dollars	7.9	5.1	5.8	7.2	5.5	9.5	6.8	6.8	5.4	6.3	11.9	21.8	100.0

Source for above tables: NPD Research.

CONSUMER BUYING HABITS

Pajamas

According to NPD, more than one-third of all unit and dollar purchases of men's pajamas and other sleepwear (not including robes) made by their panel members were in national chains (Sears, Penneys and Wards) in 1980.

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total purchases of men's pajamas	100.0%	100.0%
Department stores	27.3	32.5
National chains	34.0	34.3
Discount stores, incl. K mart	28.2	22.1
Men's specialty stores	3.4	4.3
Other outlets	6.3	5.9
Not reported	0.7	0.9

Percent of Purchases by Price Point, 1980

	% of Units	% of Dollars
Total purchases of men's pajamas	100.0%	100.0%
Less than $5.00	22.5	10.7
$5 - $6.99	25.7	20.3
$7 - $10.99	38.6	44.7
$11 & over	13.2	24.4
Sold at:		
Regular price	53.3	59.7
Sale price	43.7	37.2
Not reported	3.0	3.2

Percent of Purchases by Month, 1980

Pajamas	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	8.9%	5.2%	3.1%	3.9%	4.4%	9.1%	5.6%	4.6%	3.7%	9.9%	16.7%	24.9%	100.0%
Dollars	8.8	5.3	2.9	3.8	3.9	7.5	4.9	4.2	3.2	10.5	17.4	27.5	100.0

Source for above tables: NPD Research.

CONSUMER BUYING HABITS

Underwear

Discount stores were the favored place of purchase for both undershirts and undershorts, according to the NPD panel information.

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total men's undershirt purchases	100.0%	100.0%
Department stores	17.8	20.6
National chains	27.2	30.0
Discount stores	33.4	27.7
Men's specialty stores	4.8	7.0
Other outlets	16.3	14.2
Not reported	0.6	0.6

Percent of Purchases of Men's Undershirts by Price Points, 1980

	% of Units	% of Dollars
Total men's undershirt purchases	100.0%	100.0%
Less than $1.50	36.5	22.3
$1.50 - $1.99	30.2	28.4
$2.00 - $3.49	29.5	39.6
$3.50 & over	3.9	9.5
Sold at:		
Regular price	49.1	57.2
Sale price	45.9	37.8
Not reported	5.0	5.0

Percent of Purchases of Men's Undershirts by Month, 1980

Undershirts	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	7.4%	5.3%	8.4%	7.4%	6.6%	9.7%	7.2%	9.7%	6.7%	6.4%	9.8%	15.4%	100.0%
Dollars	6.7	4.7	8.8	7.4	6.6	9.1	6.9	10.1	6.5	6.6	10.4	16.1	100.0

Percent of Purchases of Men's Undershorts by Store Type, 1980

	% of Units	% of Dollars
Total men's undershorts purchases	100.0%	100.0%
Department stores	18.0	21.6
National chains	27.2	29.3
Discount stores, incl. K mart	34.9	28.7
Men's specialty stores	4.5	6.7
Sold at:		
Regular price	52.9	60.9
Sale price	43.4	35.2
Not reported	3.7	3.9

CONSUMER BUYING HABITS

Underwear

Percent of Purchases of Men's Undershorts by Months, 1980

Undershorts	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	6.5%	4.7%	5.0%	7.6%	7.0%	9.6%	8.5%	11.4%	7.0%	8.3%	10.2%	14.1%	100.0%
Dollars	6.0	4.6	5.2	7.3	6.6	10.3	8.2	10.5	7.0	8.6	10.8	15.0	100.0

Source for above tables: NPD Research.

Hosiery

November and December combined accounted for 32.2% of men's hosiery unit sales and 35.6% of dollar sales of men's hosiery spent by NPD panel members in 1980. Included in men's hosiery sales are sales of athletic socks as well as work socks.

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total men's hosiery purchases	100.0%	100.0%
Department stores	13.5	18.1
National chains	17.2	18.8
Discount stores, incl. K mart	40.5	33.4
Men's specialty stores	6.8	9.1
Other outlets	21.4	20.0
Not reported	0.6	0.6

Percent of Purchases by Price Points, 1980

	% of Units	% of Dollars
Total men's hosiery purchases	100.0%	100.0%
Less than $1.00	58.7	37.6
$1 - $1.49	23.4	26.0
$1.50 - $2.49	13.4	22.8
$2.50 & over	4.4	13.6
Sold at:		
Regular price	53.6	61.6
Sale price	43.3	35.3

Percent of Purchases by Months, 1980

Hosiery	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	6.0%	5.6%	5.9%	6.3%	7.1%	7.2%	5.4%	9.5%	6.9%	7.7%	12.3%	19.9%	100.0%
Dollars	6.1	4.9	5.4	5.7	6.8	7.0	5.1	9.2	6.6	7.6	13.0	22.6	100.0

Source for above tables: NPD Research.

MEN'S WORK WEAR

GENERAL STATISTICS ON THE INDUSTRY

Market Trends

After reporting increases of 30%-40% in 1979 work wear sales, many manufacturers are predicting record sales for work wear in 1980 despite the downward effect of the recession. Young consumers in the under 25 age bracket contributed mightily to these increased sales. Especially notable was their turn away from denim jeans and toward casual pants, including chinos. This turnabout may enable sales of men's chinos to surpass those of painter's pants, now the largest selling work pants style, in 1980.

Manufacturers' shipments of reported categories of men's work clothing increased 1.3% in value in 1979 to $863.9 million compared to $852.6 million in 1978. However, production declined slightly (-0.5%) to 131.3 million units. Men's and boys' work shirts, which have become popular enough to be considered sportswear rather than work wear in some cases, increased 5.8% in shipment value in 1979. The total market is estimated by industry sources at about $100 million, with career apparel for men accounting for one-third of the total.

In terms of the number of garments, the work clothing (including linen supply garments) market is much larger than the uniform and career apparel markets. A part of the work clothing market is concerned with rental work clothing. Both industrial laundries and linen supply services provide employers with rental garments. Other employers supply work clothing obtained through local retailers, or employees purchase their own.

AT THE MANUFACTURER LEVEL

The latest detailed information on the men's and boys' work clothing industry is contained in the recently released 1977 Census of Manufactures reports issued by the U.S. Bureau of the Census. This is the first complete census conducted since 1972.

In 1977, there were 347 companies which operated 656 establishments in the industry. The value of all shipments (including secondary goods not classified in this industry and miscellaneous receipts) from these establishments amounted to $3.64 billion in 1977, a 109.5% increase over the 1972 shipment value. The value added by manufacture was 124.9% higher in 1977 than in 1972.

GENERAL STATISTICS ON THE INDUSTRY

AT THE MANUFACTURER LEVEL

Work Clothing (SIC 2328*)

	1977	1972	% Change 1977/1972
Number of companies	347	297	+ 16.8%
Number of establishments, total**	656	503	+ 30.4
Number with 20 or more employees	575	435	+ 32.2
Employees, total (thous.)	113.7	89.6	+ 26.9
Production workers (thous.)	101.6	80.6	+ 26.0
Payroll (mil. $)	$ 719.4	$ 389.0	+ 84.9
Value added by manufacture# (mil. $)	$1,765.4	$ 784.8	+124.9
Value of shipments## (mil. $)	$3,641.9	$1,738.0	+109.5
Capital expenditures, new (mil. $)	$ 44.1	$ 24.1	+ 83.0

*SIC 2328 comprises establishments primarily engaged in manufacturing men's, youths' and boys' work shirts, pants, jeans, and other work clothing and washable service apparel. As noted above, uniforms and career apparel are not included, as they are primarily produced in the tailored clothing industry. For 1977 the 656 establishments (plants) in the industry included 361 manufacturers, 41 jobbers, 91 independent contractors and 163 multiplant company contractors.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The values of primary products (men's work clothing) alone, of these industries, plus the value of shipments by manufacturers classified in other industries who make suits, etc., as secondary products, are shown on page 46.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977 & 1972.

Employment & Earnings

Employment in the men's and boys' work clothing industry averaged 106.3 thousand in October 1980, a 3.7% increase over October 1979. The number of production workers rose 4.3% over the same time period.

Average weekly earnings for production workers in the industry in October 1980 were $151.73, 3.7% higher than October 1979 and 20.7% higher than the 1978 average. While both average weekly hours and average overtime hours increased in 1979 over 1978, in October 1980 they were down from the October 1979 average.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment and Earnings in the Work Clothing Industry

	Monthly Averages			Annual Averages		
	Oct. 1980(p)	Oct. 1979	% Change	1979	1978	% Change 1979/1978
Work clothing (SIC 2328*)						
All employees (thous.)	106.3	102.5	+ 3.7%	101.1	97.5	+ 3.7%
Production workers (thous.)	89.3	85.6	+ 4.3	85.2	82.2	+ 3.6
Avg. weekly earnings	$151.73	$146.30	+ 3.7	$142.49	$125.67	+13.4
Avg. hourly earnings	$ 4.18	$ 3.81	+ 9.7	$ 3.82	$ 3.53	+ 8.2
Avg. weekly hours	36.3	38.4	- 5.5	37.3	35.6	+ 4.8
Avg. overtime hours	1.1	1.3	-15.4	1.2	0.8	+50.0

(p) = preliminary
*For a definition of this SIC code, see page 40.

Source: U.S. Bureau of Labor Statistics,
Employment and Earnings, September
and December 1980.

Firms with less than 250 employees were the most prevelant in the work clothing industry in 1977, according to the census of manufactures. They accounted for 77.6% of all manufacturing establishments. However, firms with 250 or more employees were responsible for 62.7% of total shipment value.

Manufacturing Establishments in the Work Clothing Industry By Employment Class Size, 1977

	Establishments		Employees		Value of Shipments	
	No.	% of Total	No. (thous.)	% of Total	Mil. $	% of Total
Total (SIC 2328*)	656	100.0%	113.7	100.0%	$3,641.9	100.0%
By Employment Size:						
Under 50 employees	159	24.2	3.2	2.8	284.9	7.8
50-99 employees	115	17.6	8.5	7.5	217.5	6.0
100-249 employees	235	35.8	39.0	34.3	854.8	23.5
250-499 employees	114	17.4	39.6	34.8	1,118.3	30.7
500 or more employees	33	5.0	23.4	20.6	1,166.4	32.0

*For a definition of this SIC code, see page 40.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A.

GENERAL STATISTICS ON THE INDUSTRY

Manufacturers' Operating Ratios

Selected Operating Ratios for Manufacturers
In the Work Clothing Industry, 1980
(Median Results)

	Work Clothing (SIC 2328*) (60)**
Current assets to current debt (times)	1.96
Net profits on net sales (percent)	2.59
Profits on net worth (percent)	11.93
Sales to net worth (times)	4.38

*For a definition of this SIC code, see page 40.
**Number in parenthesis refers to the number of reporting companies in the industry.

Source: Dun & Bradstreet,
Key Business Ratios 1980,
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LOCATION OF THE INDUSTRY

Leading States in the Manufacture of Work Clothing

	Establishments			
	Total	With 20+ Employees	Employees (thous.)	Value of Shipments (Mil. $)
Work clothing (SIC 2328*)				
U.S., total	656	575	113.7	$3,641.9
Leading States:				
Texas	78	70	18.3	588.5
Tennessee	74	70	18.7	642.2
Georgia	57	53	10.9	323.1
Mississippi	49	49	13.5	266.6
Alabama	42	39	7.4	139.2
California	39	22	2.5	279.8
Kentucky	35	34	7.0	137.7
Missouri	36	31	5.4	110.3
New York	32	20	0.9	28.6
Total, leading states	442	388	84.6	2,516.0
Percent of U.S. total	67.4%	67.5%	74.4%	69.1%

*For a definition of this SIC code, see page 40.

Source: Based on U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A.

PRODUCTION

In addition to the complete census of manufactures compiled every five years, the Census Bureau also issues monthly and annual reports on apparel production (and value of shipments) in the Current Industrial Reports series.

Excluded from the CIR survey are many small firms which are included in the census of manufactures, where data for these firms were obtained from other government agencies. These establishments accounted for 2% of total value of shipments of men's and boys' work clothing in the 1977 census.

Production of reported types of men's & boys' work clothing declined 0.5% in 1979 compared with 1978, according to the 1979 annual CIR. The only category which increased production in 1979 was men's washable service apparel (+19.2%). The largest production decline was in men's coveralls, overalls and jumpsuits category (-7.3%).

Production of Specified Types of Men's Work Clothing, 1977-1979

	Production (thous. units)			% Change
	1979	1978	1977	1979/1978
Men's work clothing, reported categories, total*	131,292	132,000	na	- 0.5%
Men's & boys' work shirts	43,200	45,000	41,700	- 4.0
Men's & boys' overall & work-type jackets	3,300	3,420	2,112	- 3.5
Washable service apparel	21,288	17,856	16,320	+19.2
Work pants, incl. waistband overalls	44,940	45,969	**	- 1.7
Coveralls, overalls & jumpsuits	18,564	20,028	**	- 7.3

na = not available.
*Includes some boys' work clothing where indicated.
**1977 data is not comparable as dungarees were included in these categories for 1977 but not 1978 and 1979.

Source: U.S. Bureau of the Census,
Current Industrial Report,
Apparel MA-23A.

Production of Specified Men's Work Clothing By Type of Fabric & Construction 1978, 1979

	Percent of Total	
	1979	1978
Work pants, incl. waistband overalls	100.0%	100.0%
By fabric:		
All cotton and chiefly cotton	31.6	36.5
All man-made and chiefly man-made	55.9	46.9
All other fabrics Fabrics, n.s.k.	12.5	16.6
Coveralls, overalls and jumpsuits	100.0	100.0
By fabric:		
All cotton and chiefly cotton	62.9	64.7
All man-made and chiefly man-made	37.1	35.3
By construction:		
Woven fabric	98.6	72.1
Knit fabric	1.4	27.9
Washable service apparel	100.0	100.0
By fabric:		
All cotton and chiefly cotton	16.6	30.2
All man-made and chiefly man-made	68.5	54.6
All other fabrics	14.9	15.1
By construction:		
Woven fabric	53.8	55.0
Knit fabric	46.2	45.0
Men's & boys' work shirts	100.0	100.0
By fabric:		
All cotton and chiefly cotton	23.6	24.0
All man-made and chiefly man-made	66.9	67.0
All other fabrics Fabrics, n.s.k.	9.5	9.0
Men's & boys' overall and work-type jackets	100.0	100.0
By fabric:		
All cotton and chiefly cotton	39.3	35.8
All man-made and chiefly man-made	60.7	64.2

n.s.k. = not specified by kind.

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports,
Apparel, MA-23A (79-1).

PRODUCTION

Materials Consumed in Production

Value of Materials Consumed In the Production of Work Clothing, 1972, 1977

	Delivered Cost (mil. $)		
	1977	1972	% Change 1977/1972
Work clothing (SIC 2328*):			
Broad woven fabrics	$1,194.5	$521.7	+129.0%
Purchased knitted fabrics	23.8	51.9	- 54.1

*For a definition of this SIC code, see page 40.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A.

Seasonality in Production

Based on monthly reports of men's work clothing cuttings reported in the Current Industrial Report series (subject to revision), March was the busiest month for cuttings of both men's work pants and work shirts in 1979. The month accounted for 9.5% of total 1979 cuttings of work pants, and 9.8% of 1979 work shirt cuttings.

In 1980, November work pants cuttings totaled 9.6% of production while October accounted for the highest percentage of total work shirt cuttings.

Percent of Cuttings Done By Month of Selected Types of Men's Work Clothing, 1979, 1980

	Men's Work Pants		Men's Work Shirts	
	1980	1979	1980	1979
Total	100.0%	100.0%	100.0%	100.0%
January	7.4	8.7	8.3	8.3
February	7.5	8.6	8.2	8.7
March	7.6	9.5	8.8	9.8
April	8.3	8.6	9.2	8.0
May	7.7	8.9	8.4	9.2
June	8.4	8.7	8.2	8.5
July	7.0	5.2	7.4	6.3
August	9.0	8.2	7.8	8.4
September	9.4	8.5	8.0	8.2
October	9.2	9.1	9.2	9.1
November	9.6	8.4	8.5	8.8
December	8.8	7.6	8.0	6.7

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's Apparel.

PRODUCTION

Seasonality in Production

At the beginning of 1981, monthly reports in the CIR apparel series for 1979 and 1980 were under revision based on the 1979 annual report. Monthly production figures for 1980 (subject to revision) show a 4.0% decline in men's work pants cuttings and a 2.4% decline in men's work shirt production compared to 1979.

SHIPMENTS

Monthly and annual data on production and value of shipments of men's work clothing is available in the Current Industrial Report (CIR) series issued by the Census Bureau. As previously noted, the CIR is subject to certain limitations and is not directly comparable to findings in the complete census of manufacturers.

According to the 1979 annual apparel CIR, reported categories of men's work clothing registered a 1.3% increase in shipment value over 1978. The biggest increase in value was in the men's washable service apparel classification, up 22.9% in 1979 compared to 1978.

Value of Shipments of Specified Types of Men's Work Clothing, 1978, 1979

	Value of Shipments (million $)			% Change
	1979	1978	1977	1979/1978
Men's work clothing, reported categories, total*	$863.9	$852.6	na	+ 1.3%
Men's & boys' work shirts	225.3	212.9	$177.2	+ 5.8
Men's & boys' overall & work-type jackets	33.4	34.3	20.7	- 2.6
Washable service apparel	94.9	77.2	77.3	+22.9
Work pants, incl. waistband overalls	298.4	302.0	**	- 1.2
Coveralls, overalls & jumpsuits	211.9	226.2	**	- 6.3

*Includes some boys' work clothing where indicated.
**1977 data not comparable as dungarees were included in these categories for 1977, but not 1978 and 1979.

Source: U.S. Bureau of the Census,
Current Industrial Report,
Apparel MA-23A (79)-1.

The 1979 annual CIR on gloves and mittens contained quantity and value of shipment information on work gloves and mittens. In that year, the shipment value of this category went up 13.4% over 1978 while the quantity shipped was 5.1% higher. All fabric work gloves and mittens increased 13.2 in value and 6.9% in quantity. All leather work gloves and mittens declined 6.9% in quantity shipped in 1979 compared to 1978, but shipment value rose 14.2%.

SHIPMENTS

Quantity and Value of Shipments of Gloves and Mittens, 1977-1979

	Quantity (thous. doz. pairs)				Value (million $)			
	1979	1978	1977	% Change 1979/1978	1979	1978	1977	% Change 1979/1978
Work gloves & mittens, total	36,012	34,271	34,052	+ 5.1%	$452.0	$398.5	$370.2	+13.4%
All fabric	30,421	28,446	28,270	+ 6.9	261.4	230.9	222.8	+13.2
Single canton flannel	8,644	8,226	8,533	+ 5.1	na	na	na	
Double canton flannel	5,863	5,699	5,351	+ 2.9	na	na	na	
Fleeced cotton jersey	5,121	4,254	4,096	+20.4	na	na	na	
Circular knit cotton	5,356	5,079	5,309	+ 5.4	na	na	na	
Coated & partially coated fabrics	4,820	4,552	4,319	+ 5.9	na	na	na	
All other fabrics, excl. fabrics, n.s.k.	617	636	662	- 3.0	na	na	na	
All leather	2,188	2,351	2,211	- 6.9	114.5	100.3	85.2	+14.2
All grain, except welders	1,119	1,220	1,191	- 8.3	na	na	na	
All split, except welders	585	644	573	- 9.2	na	na	na	
All other leather, incl. welders	484	487	447	- 0.6	na	na	na	
Leather & fabric combinations	1,226	1,384	1,499	-11.4	47.3	41.4	38.6	+14.2
Fabric work gloves & mittens, n.s.k.	2,010	1,900	1,890	+ 5.8	20.2	17.9	16.6	+12.8
Leather work gloves & mittens, n.s.k.	167	190	182	-12.1	8.6	8.0	7.0	+ 7.5

na = not available.
n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census
Current Industrial Reports
Gloves and Mittens MA-23D(79)-1.

By Region

Tennessee held a 17.7% share of the $729.7 million total shipment value (excluding contract work) of men's and boys' work clothing reported in the 1977 Census of Manufactures. Texas was next in total value of shipments with a 17.4% share.

Contract work on men's and boys' work clothing accounted for a total value of shipments of $411.2 million in 1977. Texas was the leading state in shipments with a 14.5% share.

SHIPMENTS

By Region

Value of Shipments of Work Clothing By All Producers By Geographic Area, 1972, 1977

	Value of Shipments (million $)		
	1977	1972	% Change 1977/1972
Work clothing (SIC 2328*)			
United States, total	$729.7	$534.8**	+ 36.4%
New England Division:			
Massachusetts	7.5		
Middle Atlantic Division:			
New York	7.1		
Pennsylvania	14.2		
East North Central Division:			
Indiana	48.0		
Illinois	7.4		
West North Central Division:			
Missouri	37.7		
South Atlantic Division:			
Georgia	48.2		
East South Central Division:			
Kentucky	82.4		
Tennessee	129.5		
Alabama	23.5		
Mississippi	44.5		
West South Central Division:			
Arkansas	16.7		
Louisiana	4.6		
Texas	127.1		
Pacific Division:			
California	33.5		
Total, leading states	631.9		
Percent of U.S. total	86.6%		
Contract work on work clothing			
United States, total	$411.2	$188.4	+118.3
Middle Atlantic Division:			
Pennsylvania	11.6	14.5	- 20.0
West North Central Division:			
Missouri	24.6	18.7	+ 31.5
South Atlantic Division:			
Maryland	4.1	3.2	+ 28.1
North Carolina	13.3	7.8	+ 70.5
Georgia	26.1	14.4	+ 81.2
Florida	4.5	na	--

(continued)

SHIPMENTS

By Region

Value of Shipments of Work Clothing By All Producers By Geographic Area, 1972, 1977

	Value of Shipments (million $)		
	1977	1972	% Change 1977/1972
Contract work on work clothing (continued)			
East South Central Division:			
Kentucky	$ 20.7	$ 11.0	+ 88.2%
Tennessee	50.8	31.1	+ 63.3
Alabama	50.6	15.9	+218.2
Mississippi	31.1	9.4	+230.8
West South Central Division:			
Arkansas	4.9	3.7	+ 32.4
Louisiana	4.5	2.7	+ 66.7
Oklahoma	47.1	5.4	+772.2
Texas	59.6	22.3	+167.3
Pacific Division:			
California	4.4	na	--
Total, leading states	357.9	na	--
Percent of U.S. total	87.0%	na	--
Work gloves & mittens			
United States, total	263.0	148.6**	+ 77.0
Middle Atlantic Division:			
New York	2.2		
New Jersey	2.6		
Pennsylvania	7.6		
East North Central Division:			
Indiana	4.8		
Illinois	6.4		
Michigan	3.9		
West North Central Division:			
Missouri	23.0		
South Atlantic Division:			
Virginia	2.8		
North Carolina	51.9		
Georgia	16.1		
East South Central Division:			
Mississippi	36.2		
West South Central Division:			
Texas	5.0		

na = not available

*For a definition of this SIC code, see page 40.

**1972 value of shipments for geographic areas not available.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC77-I-23A.

PRODUCER PRICES

Preliminary Producer Price Index figures for 1980 show men's work wear rising at a more rapid rate than overall men's wear. For example, men's workpants wholesale prices increased 17.3% over the 1979 average while overall men's apparel increased by 7.7% from their 1979 average.

Producer Prices for Specified Men's Work Clothing, 1978-1980
(1967 = 100 unless otherwise indicated)

	Annual Averages			% Change	
	1980(p)	1979	1978	1980/ 1979	1980/ 1978
All men's apparel	200.3	186.0	176.1	+ 7.7%	+13.7%
Workpants	212.1	180.8	173.4	+17.3	+22.3
Overalls & work-type jackets (Dec. 1977 = 100)	130.1	114.9	106.1	+13.2	+22.6
Work gloves & mittens	267.0	243.4	218.1	+ 9.7	+22.4

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

RETAIL SALES

The census of retail trade provides the only official data on sales by merchandise line in specific types of stores with payrolls. In the 1977 census, men's career and work wear sales in stores which broke out their sales by merchandise classification amounted to $989.2 million. Department stores held a 56.5% share of sales in 1977, followed by men's and boys' wear stores and family clothing stores, both with 19.2% shares.

Reported Sales of Men's Career/Work Wear By Store Type, 1977
(Including Stores With Payrolls Only)

	Stores Reporting Sales		Sales	
	Number*	Percent	Mil. $	Percent
Total**	22,570	100.0%	$989.2	100.0%
Department stores***	5,924	26.2	559.2	56.5
Men's & boys' wear stores	5,442	24.1	190.4	19.2
Family clothing stores	7,573	33.5	189.8	19.2
Other (men's shoe stores & mail order houses)	3,640	16.2	49.8	5.1

*Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.

**Total is based only on stores which reported sales of career/work wear. Not all store types broke out sales for this category. The above reflects sales in major outlet types.

***Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order houses data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

RETAIL SALES

Almost 10% of men's and boys' wear sales in mail order houses in 1977 came from the men's career/work wear category, the highest sales share of any store type where volume was classified by merchandise line. Men's career/work wear accounted for 6.3% of men's and boys' wear sales in family clothing stores.

Percent of Total Men's and Boys' Wear Sales Accounted For By Men's Career/Work Wear in Specified Store Types, 1977

	Men's & Boys' Wear Sales* (million $)	% of Sales Accounted For By Men's Career/Work Wear
Department stores**	$10,574.9	5.3%
Men's & boys' wear stores	6,275.4	3.0
Family clothing stores	3,001.5	6.3

*Excludes men's & boys' footwear sales.
**Includes discount department stores as well as traditional department stores. See footnote in table above.

Source: U.S. Bureau of the Census, 1977 Census of Retail Trade RC77-L.

CONSUMER BUYING HABITS

Information on men's work shirts and work pants has been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc., Floral Park, N.Y. They are based on the findings from an on-going monthly panel diary, tracking the purchases of 6,500 nationally representative families. (Note that "singles"—with their own households—are not included. The data includes purchases made for men 17 years of age and over.)

Percent of Purchases by Store Type, 1980

	Work Shirts		Work Pants	
	% of Units	% of Dollars	% of Units	% of Dollars
Total purchases	100.0%	100.0%	100.0%	100.0%
Department stores	10.7	12.7	8.1	7.7
National chains	50.0	51.7	55.1	52.6
Discount stores, incl. K mart	25.6	20.9	20.1	19.3
Men's specialty store	4.6	6.6	8.1	10.7
Other outlets	8.5	7.5	8.3	9.3
Not reported	0.4	0.6	0.4	0.5

Percent of Purchases by Price Points, 1980

	Work Shirts	
	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $5.00	26.6	12.8
$5 - $8.99	48.7	45.2
$9 - $12.99	17.1	25.3
$13 & over	7.8	16.6
Sold at:		
Regular price	42.4	49.9
Sale price	53.2	45.9
Not reported	4.4	4.2

	Work Pants	
	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $8.00	17.3	8.1
$8 - $13.99	53.5	46.2
$14 - $19.99	21.5	29.0
$20 & over	7.7	16.7
Sold at:		
Regular price	61.3	64.5
Sale price	35.3	31.5
Not reported	3.4	4.0

Percent of Purchases by Months, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Work shirts													
Units	6.3%	5.4%	2.6%	3.7%	4.3%	6.2%	5.0%	4.4%	7.6%	15.7%	17.6%	21.3%	100.0%
Dollars	6.0	4.8	2.5	3.1	4.0	6.4	3.9	4.1	7.0	16.5	17.6	24.1	100.0
Work pants													
Units	6.5	6.3	5.8	7.2	5.8	9.8	7.2	8.3	10.6	7.9	9.9	14.9	100.0
Dollars	6.2	6.0	6.2	5.9	5.1	8.0	6.6	7.5	10.6	7.7	12.4	17.8	100.0

Source for above tables: NPD Research.

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store type.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S)(April) : Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR (May): Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS) (May): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (August): Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS (June): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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FASHION ACCESSORIES

Market Trends

The U.S. consumer is facing cutbacks in his/her discretionary spending due to inflation, taxes and economic conditions and this is detrimental to sales of fashion accessories. In past years, accessories such as small leather goods and belts were often thought of as "impulse" items which consumers bought on a whim. However, the consumer is now more careful with his dollars because it is needed elsewhere.

Accessory manufacturers have tried, with moderate success, to combat this buying resistance through the introduction of new colors and fabrics from which to choose. In addition, many consumers would rather purchase a less expensive accessory item to enliven their present wardrobe than buy a new one at the present time. Many consumers are willing to buy quality accessories which may cost a little more but will last a long time. For these reasons, sales of accessories have held up better than many apparel items. According to NPD Research, men's accessory sales, in the 12 month period ending November 1980, were 3.2% higher than in the previous 12 months.

Fashion accessories for both men and women consist of a wide variety of products, both decorative and utilitarian, including such diverse items as gloves, handbags, precious and costume jewelry, scarfs, sunglasses and umbrellas.

Accessories cannot be defined in a single standard industry classification whose value or size is readily measured. An evaluation is further complicated by the fact that some accessories, notably belts and trimmings such as buckles and the like, are sold either to other apparel manufacturers who use them as accessories for the articles they produce, or they are sold directly to the retail customer through normal retail channels.

The distinction between items included in the men's furnishings category and in fashion accessories is also subject to varying interpretations, further complicating the problem of evaluating the size of the market. For the purpose of the FACT FILE reports, it should be noted that information on men's neckwear, hats and underwear is covered in detail in the Men's Furnishings & Work Wear Fact File and information on men's and women's hosiery is detailed in the Bodywear, Legwear/Hosiery Fact File.

At the Manufacturer Level

GENERAL STATISTICS ON THE INDUSTRY

The 1977 Census of Manufactures provides the latest detailed information on manufacturers classified in the accessories component industries. This is the first complete census conducted since 1972.

Value of shipments of these selected accessories industries was a combined $6.9 billion, with the jewelry industry (both precious metal and costume) accounting for $2.9 billion. The total value at the wholesale (or factory) level is considerably higher due to the vast amount of imports, which are an important factor in almost every category within the accessories classification.

GENERAL STATISTICS ON THE INDUSTRY

	Costume Jewelry (SIC 3691*)			Jewelry, Precious Metal (SIC 3911*)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Number of companies	837	764	+ 9.5%	2,165	1,497	+ 44.6%
Number of establishments, total**	847	766	+ 10.6	2,206	1,524	+ 44.7
Number with 20 or more employees	236	208	+ 13.5	405	315	+ 28.6
Employees, total (thous.)	25.0	21.4	+ 16.8	42.1	32.6	+ 29.1
Production workers (thous.)	20.8	17.6	+ 18.2	29.2	23.8	+ 22.7
Payroll (mil. $)	215.9	132.1	+ 63.4	432.0	267.2	+ 61.7
Value added by manufacture# (mil. $)	485.1	275.7	+ 75.9	979.8	536.0	+ 82.8
Value of shipments## (mil. $)	816.6	471.6	+ 73.1	2,107.0	1,124.6	+ 87.3
Capital expenditures, new (mil. $)	17.6	6.7	+162.7	25.6	10.3	+148.5

	Watches, Clocks (SIC 3873*)			Apparel Belts (SIC 2387*)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Number of companies	283	184	+ 53.8%	281	292	- 3.8%
Number of establishments**	302	202	+ 49.5	284	297	- 4.4
Number with 20 or more employees	112	99	+ 13.1	119	132	- 9.8
Employees, total (thous.)	31.5	30.8	+ 2.3	9.4	10.3	- 8.7
Production workers (thous.)	24.0	24.7	- 2.8	7.3	8.7	- 16.1
Payroll (mil. $)	316.6	230.3	+ 37.5	76.1	65.9	+ 15.5
Value added by manufacture# (mil. $)	684.5	466.0	+ 46.9	150.3	132.5	+ 13.4
Value of shipments## (mil. $)	1,594.7	937.2	+ 70.1	286.9	257.5	+ 11.4
Capital expenditures, new (mil. $)	23.2	18.8	+ 23.4	2.5	3.2	- 21.9

	Fabric Dress & Work Gloves (SIC 2381*)			Leather Gloves (SIC 3151*)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Number of companies	100	106	- 5.7%	84	95	- 11.6%
Number of establishments**	132	137	- 3.6	101	106	- 4.7
Number with 20 or more employees	92	94	- 2.1	66	60	+ 10.0
Employees, total (thous.)	10.9	11.9	- 8.4	5.5	4.9	+ 12.2
Production workers (thous.)	9.9	10.9	- 9.2	4.7	4.3	+ 9.3
Payroll (mil. $)	69.0	56.3	+ 22.5	33.9	22.1	+ 53.4
Value added by manufacture# (mil. $)	160.9	100.3	+ 60.4	67.6	43.0	+ 57.2
Value of shipments## (mil. $)	312.4	198.8	+ 57.1	178.0	98.2	+ 81.3
Capital expenditures, new (mil. $)	3.5	1.9	+ 84.2	1.9	0.5	+280.0

(continued)

GENERAL STATISTICS ON THE INDUSTRY

	Women's Handbags (SIC 2171*)			Small Leather Items (SIC 3172*)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Number of companies	404	431	- 6.3%	253	238	+ 6.3%
Number of establishments**	418	444	- 5.8	260	244	+ 6.5
Number with 20 or more employees	186	214	- 13.1	97	98	- 1.0
Employees, total (thous.)	20.3	22.2	- 8.5	11.9	11.5	+ 3.5
Production workers (thous.)	18.2	19.8	- 8.1	9.6	9.3	+ 3.2
Payroll (mil. $)	144.0	121.7	+ 18.3	98.2	73.4	+ 33.8
Value added by manufacture# (mil. $)	266.5	201.5	+ 32.2	205.8	143.7	+ 43.2
Value of shipments## (mil. $)	505.2	365.0	+ 38.4	366.8	242.2	+ 51.4
Capital expenditures, new (mil. $)	6.6	3.7	+ 78.4	4.8	2.8	+ 71.4

	Luggage (SIC 3161*)			Millinery (SIC 2351*)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Number of companies	286	266	+ 7.5%	151	215	- 29.8%
Number of establishments**	298	277	+ 7.6	151	216	- 30.1
Number with 20 or more employees	130	130	--	47	52	- 9.6
Employees, total (thous.)	19.2	17.1	+ 12.3	2.7	3.2	- 15.6
Production workers (thous.)	15.8	14.3	+ 10.5	2.2	2.7	- 18.5
Payroll (mil. $)	164.1	106.8	+ 53.6	20.2	17.0	+ 18.8
Value added by manufacture# (mil. $)	328.3	194.1	+ 69.1	32.8	33.2	- 1.2
Value of shipments## (mil. $)	654.9	364.5	+ 79.7	75.1	58.1	+ 29.2
Capital expenditures, new (mil. $)	8.1	8.9	- 9.0	0.2	0.3	- 33.3

nr = not reported

*Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made as shown below:

SIC 3961 covers manufacturers specializing in the production of costume jewelry, costume novelties and ornaments made of all materials except precious metal, etc.

SIC 3911 covers manufacturers specializing in the production of jewelry and other articles worn on or carried about the person, made of precious metals with or without stones, including cigarette cases and lighters, vanity cases and compacts; trimmings for umbrellas and canes; and jewel settings and mountings.

SIC 3873 covers manufacturers specializing in the production of clocks, watches, watchcases, mechanisms for clockwork-operated devices and clock and watch parts, as well as establishments primarily engaged in assembling clocks and watches from purchased movements and cases.

SIC 2387 covers manufacturers specializing in the production of men's and women's apparel belts, regardless of material.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

SIC 2381 covers manufacturers specializing in the production of dress, semi-dress, and work gloves and mittens, cut and sewn from purchased woven or knit fabric, or these fabrics combined with leather or plastic.

SIC 3151 covers manufacturers specializing in the production of dress, semi-dress, and work gloves exclusively of leather or leather with lining of other material.

SIC 3171 covers manufacturers specializing in the production of women's handbags and purses of leather or other materials, except precious metals.

SIC 3172 covers manufacturers specializing in the production of small articles, such as billfolds, key cases, and coin purses of leather or other materials, except precious metals.

SIC 3161 covers manufacturers specializing in the production of luggage of leather or other material.

SIC 2351 covers manufacturers specializing in the production of women's, misses', children's and infants' millinery.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). Available data on the total value of specific products shipped by both those classified in the industry (primary producers) and by secondary producers (who are classified in other industries) are covered in the value of shipments for the latest year available compared with other years, as shown on page 14.

Source: U.S. Bureau of the Census, Census of Manufactures, 1972, 1977.

Employment & Earnings

According to the latest employment and earnings report issued by the U.S. Department of Labor, all of the accessories industries measured by the Department declined in employment numbers in 1980 as compared to 1979. The number of employees in the luggage industry fell the most, 17.0%. However, average weekly earnings of production workers in the five accessories industries covered rose during this same period.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Total Employment and Earnings of Production Workers In Specified Accessories Manufactures

	Annual Averages			% Change
	1980(p)	1979	1978	1980/1979
Costume jewelry (SIC 3961*)				
All employees (thous.)	27.9	32.1	34.6	- 13.1%
Production workers (thous.)	21.9	25.9	28.3	- 15.4
Avg. weekly earnings	$166.30	$150.10	$140.21	+ 10.8
Jewelry & precious metals (SIC 3911*)				
All employees (thous.)	36.5	39.8	42.2	- 8.3%
Production workers (thous.)	25.7	28.5	30.4	- 9.8
Avg. weekly earnings	$213.78	$189.58	$179.65	+ 12.8
Women's handbags & personal leather goods (SIC 317*)				
All employees (thous.)	30.8	33.2	32.4	- 7.2%
Production workers (thous.)	26.3	28.4	27.2	- 7.4
Avg. weekly earnings	$154.85	$148.34	$136.52	+ 4.4
Watches, clocks & watchcases (SIC 387*)				
All employees (thous.)	22.8	28.1	30.0	- 18.9%
Production workers (thous.)	17.0	21.6	23.1	- 21.3
Avg. weekly earnings	$202.67	$184.30	$174.05	+ 10.0
Luggage (SIC 3161*)				
All employees (thous.)	14.6	17.6	17.3	- 17.0%
Production workers (thous.)	11.0	13.7	13.3	- 19.7
Avg. weekly earnings	$177.98	$159.56	$151.48	+ 11.5

*For a definition of these SIC numbers, see pages 3 and 4.
(p) = preliminary

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Employment Size

In all the accessories industries shown in the table below, over half of all manufacturing plants employed less than 50 persons in 1977. The fabric dress and work glove industry had the lowest percentage of manufacturing establishments with employment under 50 persons (53.8%) while the costume jewelry industry had 92.8% of its' plants in this employment category.

Large plants with 50 persons or more held the dominant share of value of shipments in these industries. The share of shipment value coming from large plants ranged from a low of 62.6% (precious metal jewelry industry) to a high of 93.8% (watches and clocks industry).

GENERAL STATISTICS ON THE INDUSTRY

Employment Size

Manufacturing Establishments in Specified Accessories Manufactures By Employment Class Size, 1977

	Establishments		Employees		Value of Shipments	
	No.	% of Total	No. (Thous.)	% of Total	Mil. $	% of Total
Jewelry, precious metals (SIC 3911*), total	2,206	100.0%	42.1	100.0%	$2,107.0	100.0%
By Establishment Size:						
Under 10 employees	1,526	69.2	4.0	9.5	1,409.3	10.1
10-49 employees	520	23.6	11.2	26.6	574.9	27.3
50-249 employees	140	6.3	15.0	35.6	748.0	35.5
250 employees or more	20	0.9	12.0	28.5	571.7	27.1
Costume jewelry (SIC 3961*), total	847	100.0	25.0	100.0	816.6	100.0
By Establishment Size:						
Under 10 employees	498	58.8	1.4	5.6	54.8	6.7
10-49 employees	246	29.0	5.5	22.0	175.0	21.4
50-249 employees	82	9.7	8.6	34.4	228.6	28.0
250 employees or more	21	2.5	9.5	38.0	358.3	43.9
Watches & clocks (SIC 3873*), total	303	100.0	31.6	100.0	1,597.8	100.0
By Establishment Size:						
Under 10 employees	150	49.5	0.4	1.3	16.4	1.0
10-49 employees	78	25.7	1.8	5.7	81.7	5.1
50-249 employees	44	14.5	5.0	15.8	206.6	12.9
250 employees or more	31	10.2	24.6	77.8	1,293.1	80.9
Apparel belts (SIC 2387*), total	284	100.0	9.4	100.0	286.9	100.0
By Establishment Size:						
Under 10 employees	120	42.3	0.5	5.3	13.9	4.8
10-49 employees	111	39.1	2.6	27.4	75.4	26.3
50-99 employees	35	12.3	2.5	26.3	64.5	22.5
100 employees or more	17	6.0	3.9	41.0	133.1	46.4
Fabric dress & work gloves (SIC 2381*), total	132	100.0	10.9	100.0	312.4	100.0
By Establishment Size:						
Under 10 employees	29	22.0	0.1	0.9	3.0	1.0
10-49 employees	42	31.8	1.3	11.9	31.3	10.0
50-249 employees	51	38.6	5.6	51.4	139.7	44.7
250 or more	10	7.6	3.9	35.8	138.4	44.3

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Employment Size

Manufacturing Establishments in Specified Accessories Manufactures
By Employment Class Size, 1977
(continued)

	Establishments		Employees		Value of Shipments	
	No.	% of Total	No. (Thous.)	% of Total	Mil. $	% of Total
Leather gloves & mittens (SIC 3151*), total	101	100.0%	5.5	100.0%	$ 178.0	100.0%
By Establishment Size:						
Under 10 employees	21	20.8	(D)	--	3.0	1.7
10-49 employees	38	37.6	1.0	18.2	19.0	10.7
50-99 employees	24	23.8	1.7	30.9	69.8	39.2
100 employees or more	18	17.8	2.8	50.9	86.2	48.4
Women's handbags & purses (SIC 3171*), total	418	100.0	20.3	100.0	505.2	100.0
By Establishment Size:						
Under 10 employees	174	41.6	0.5	2.5	15.6	3.1
10-49 employees	141	33.7	3.4	16.7	87.2	17.3
50-249 employees	85	20.3	9.0	44.3	255.9	50.7
250 employees or more	18	4.3	7.4	36.5	146.6	29.0
Small personal leather goods (SIC 3172*), total	260	100.0	11.9	100.0	366.8	100.0
By Establishment Size:						
Under 10 employees	135	51.9	0.3	2.5	9.8	2.7
10-49 employees	67	25.8	1.6	13.6	43.4	11.8
50-249 employees	49	18.8	4.9	41.5	152.6	41.6
250 employees or more	9	3.5	5.0	42.4	161.1	43.9
Millinery (SIC 2351*), total	151	100.0	2.7	100.0	75.1	100.0
By Establishment Size:						
Under 10 employees	76	50.3	0.2	7.7	11.3	15.0
10-49 employees	64	42.4	1.5	57.7	42.8	57.0
50 employees or more	11	7.3	0.9	34.6	21.0	28.0
Luggage (SIC 3161*), total	298	100.0	19.2	100.0	654.9	100.0
By Establishment Size:						
Under 10 employees	125	41.9	0.5	2.6	15.0	2.3
10-49 employees	89	29.9	2.0	10.4	53.8	8.2
50-249 employees	68	22.8	7.1	[illegible].0	234.4	35.8
250 or more employees	16	5.4	9.8	51.0	351.7	53.7

(D) = Less than 0.1 thousand.
* For a definition of these SIC codes, see pages 3 and 4.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

New York State was the leading manufacturing state in nine of the ten accessories industries covered. In the costume jewelry industry, Rhode Island was the leading state, with 37% of the manufacturing establishments and 52.5% of the shipment value in this industry.

Leading States in Specified Accessories Manufactures, 1977

	No. of Establishments			
	Total	With 20+ Employees	Employees (Thous.)	Value of Shipments (Mil. $)
Millinery (SIC 2351*)				
United States, total	151	47	2.7	$ 75.1
Leading states:				
New York	95	26	1.4	46.0
New Jersey	3	2	(D)	(D)
Costume jewelry (SIC 3961*)				
United States, total	847	236	25.0	816.6
Leading states:				
Rhode Island	315	119	13.1	428.4
New York	207	52	3.6	115.2
California	86	18	1.4	36.9
Massachusetts	49	17	3.1	114.0
New Jersey	18	8	0.7	19.7
Illinois	13	2	(D)	(D)
Connecticut	12	5	1.9	65.9
Colorado	11	3	0.2	2.1
Pennsylvania	10	3	0.3	7.0
Jewelry & precious metals (SIC 3911*)				
United States, total	2,206	405	42.1	2,107.0
Leading states:				
New York	759	171	12.9	893.2
Rhode Island	295	69	9.9	370.2
California	254	25	2.4	122.6
New Mexico	114	9	1.3	38.8
Massachusetts	76	25	4.1	162.4
Florida	72	8	0.8	39.0
New Jersey	66	20	2.0	114.5
Pennsylvania	64	7	0.5	26.8
Texas	58	12	1.9	83.4
Illinois	47	7	0.7	35.7
Arizona	44	4	(D)	(D)
Ohio	36	6	0.5	21.6
Washington	35	8	0.5	16.5
Colorado	34	6	0.3	9.1
Michigan	34	4	0.3	16.5
Indiana	16	5	0.8	41.3

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading States in Specified Accessories Manufactures, 1977
(continued)

	No. of Establishments			
	Total	With 20+ Employees	Employees (Thous.)	Value of Shipments (Mil. $)
Watches, clocks & watchcases (SIC 3873*)				
United States, total	303	113	31.6	$1,597.8
Leading states:				
New York	71	30	4.8	255.6
California	52	7	0.7	36.2
New Jersey	21	10	0.9	34.5
Illinois	18	7	3.5	139.4
Michigan	16	8	1.3	70.3
Pennsylvania	12	8	1.1	43.6
Women's handbags & purses (SIC 3171*)				
United States, total	418	186	20.3	505.2
Leading states:				
New York	195	100	8.4	254.7
California	53	17	1.7	38.7
Florida	23	9	(D)	(D)
New Jersey	21	12	2.9	61.0
Texas	17	7	0.7	16.1
Massachusetts	15	6	0.6	12.9
Personal leather goods (SIC 3172*)				
United States, total	260	97	11.9	366.8
Leading states:				
New York	79	39	3.1	95.6
California	34	4	0.5	11.7
Massachusetts	23	8	1.8	49.8
Illinois	14	6	(D)	(D)
New Jersey	13	8	0.7	26.5
Rhode Island	12	10	(D)	(D)
Leather gloves & mittens (SIC 3151*)				
United States, total	101	66	5.5	178.0
Leading states:				
New York	30	16	1.4	50.8
Wisconsin	18	13	0.8	20.6
Illinois	9	7	0.7	14.9
Texas	4	4	0.4	12.8

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading States in Specified Accessories Manufactures, 1977
(continued)

	No. of Establishments			
	Total	With 20+ Employees	Employees (Thous.)	Value of Shipments (Mil. $)
Fabric dress & work gloves (SIC 2381*)				
United States, total	132	92	10.9	$ 312.4
Leading states:				
New York	21	7	0.3	12.3
North Carolina	14	13	2.4	59.2
Mississippi	11	10	(D)	(D)
Ohio	9	6	(D)	(D)
Georgia	8	7	0.5	18.3
Missouri	6	6	0.6	27.8
Pennsylvania	6	4	0.4	9.1
Alabama	3	3	0.9	21.7
Belts (SIC 2387*)				
United States, total	284	119	9.4	286.9
Leading states:				
New York	142	55	3.2	95.0
California	42	9	0.7	21.2
Texas	15	13	1.3	29.6
Pennsylvania	12	6	0.5	14.0
Massachusetts	11	7	0.6	16.5
Connecticut	7	4	0.7	32.3
Luggage (SIC 3161*)				
United States, total	298	130	19.2	654.9
Leading states:				
New York	75	39	3.9	114.9
California	36	12	1.1	37.7
Illinois	28	7	0.5	15.4
New Jersey	20	13	1.7	51.1
Pennsylvania	13	7	0.9	32.5
Tennessee	9	5	1.6	44.3

(D) = Withheld by the Census Bureau to avoid disclosing operations of individual firms.

* For a definition of these SIC numbers, see pages 3 and 4.

Source: Based on U.S. Bureau of the Census, Census of Manufactures, 1977, *Industry Series*.

PRODUCTION

Materials Consumed in Production

The 1977 Census of Manufactures contains the most complete information available on materials consumed in the manufacture of specified accessories, as noted below.

Materials Consumed in the Production of Specified Accessories, 1977

	Delivered Cost (Million $)
JEWELRY, PRECIOUS METALS (SIC 3911*)	
Materials, parts, containers and supplies	$1,041.6
Precious metals, all forms	390.1
Precious, semiprecious and synthetic stones & pearls	222.4
Jewelers' findings, including joints, pins, clasps, chains, etc.	78.9
Paper and paperboard products, including shipping containers, etc.	15.7
Other materials and components, parts, containers and supplies (incl. n.s.k.)	334.5
WATCHES, CLOCKS AND WATCHCASES (SIC 3873*)	
Materials, parts, containers and supplies	803.6
Fractional horsepower electric motors	4.2**
Watchcases of precious metals	25.1**
Watchcases of all other metals, including plastic	27.8**
Watch movements and modules, integrated circuits, diodes, etc., & watch parts (incl. dials, hands, displays, etc.)	365.0
Plastic resins and fabricated plastic products, except gaskets	23.3
Other materials and components, parts, containers and supplies (incl. n.s.k.)	358.2
FABRIC DRESS AND WORK GLOVES (SIC 2381*)	
Materials, parts, containers, and supplies	131.8
Broad woven fabrics	48.3
Purchased knitted fabric, including transfers from other plants of same company	27.9
Finished leather	13.9
All other materials and components, parts, containers and supplies (incl. n.s.k.)	41.7
LEATHER GLOVES AND MITTENS (SIC 3151*)	
Materials, containers, and supplies	68.5
Finished leather	46.8
Broad woven fabrics	4.1
Purchased knitted fabrics	4.1
All other materials and components, parts, containers, and supplies (incl. n.s.k.)	13.5

(continued)

PRODUCTION

Materials Consumed in Production

Materials Consumed in the Production of Specified Accessories, 1977
(continued)

	Delivered Cost (Million $)
APPAREL BELTS (SIC 2387*)	
Materials, containers, and supplies	$ 122.7
Broad woven fabrics	4.3
Purchased knitted fabrics, including transfers from other plants of same company	1.7
Finished leather	60.8
All other materials and components, parts, containers, and supplies (incl. n.s.k.)	55.9
WOMEN'S HANDBAGS AND PURSES (SIC 3171*)	
Materials, parts, containers, and supplies	184.0
Broad woven fabrics (piece goods)	12.1
Coated, impregnated, or laminated plastics on cloth backing, including artificial leather	23.1
Paper and paperboard products, except shipping and packaging materials	1.1
Plastic resins and plastic products	23.0
Finished leather	34.0
Trunk and luggage hardware, including locks	2.1
Other materials and components, parts, containers, and supplies (incl. n.s.k.)	88.6
PERSONAL LEATHER GOODS (SIC 3172*)	
Materials, parts, containers, and supplies	140.4
Broad woven fabrics (piece goods)	6.2
Coated, impregnated, or laminated plastics on cloth backing, incl. artificial leather	7.0
Paper and paperboard products, except shipping and packaging materials	2.6
Plastic resins and plastic products	15.4
Finished leather	34.6
Trunk and luggage hardware, including locks	1.6
All other materials and components, parts, containers, and supplies (incl. n.s.k.)	73.0

(continued)

Materials Consumed in Production

Materials Consumed in the Production of Specified Accessories, 1977
(continued)

	Delivered Cost (Million $)
LUGGAGE (SIC 3161*)	
Materials, containers, and supplies	$ 271.4
Broad woven fabrics (piece goods)	15.5
Coated, impregnated, or laminated plastics on cloth backing, including artificial leather	51.3
Paper and paperboard products, except shipping and packaging materials	7.0
Plastic resins and plastic products	21.3
Finished leather	7.7
Trunk and luggage hardware, including locks	34.0
Other materials and components, parts, containers, and supplies (incl. n.s.k.)	134.6

n.s.k. - not specified by kind.
* For definition of SIC numbers, see pages 3 and 4.
** Represents the value of materials purchased.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

SHIPMENTS

Summary of
Value of Shipments by All U.S. Producers of Specified Accessories, 1972, 1977

	Value of Shipments (Million $)		
	1977	1972	% Change 1977/1972
Specified accessories, total	$5,445.5	nr	--
Jewelry, precious metal & costume jewelry	2,689.2	1,423.5	+88.9
Precious metal	1,907.7	981.8	+94.3
Platinum or karat gold	1,250.5	656.7	+90.4
Other precious metals	353.0	178.5	+97.7
Jewelry, n.s.k.	303.1	146.6	+106.7
Costume jewelry	781.5	441.7	+76.9
Watches	772.0	477.5	+61.7
Watches with imported movements or modules	300.7	192.1	+56.5
Watches with domestic movements or modules, clock cases and parts	471.3	285.4	+65.1
Apparel belts*	244.3	234.1	+ 4.4
Women's & children's	71.4	69.5	+ 2.7
Men's & boys'	132.7	126.0	+ 5.3
Other, n.s.k.	40.2	38.6	+ 4.1
Dress & semi-dress gloves & mittens	56.3	**	--
Leather	29.3	**	--
Fabric	18.2	**	--
Leather & fabric combination	8.8	**	--
Small personal leather goods	369.2	231.8	+59.3
Handbags & purses	436.2	344.4	+26.6
Millinery	74.2	58.7	+26.4
Luggage	585.3	321.9	+81.9
Other accessories	222.8	nr	--
Cotton handkerchiefs	27.0	28.0	- 3.6
Umbrellas, parasols & canes	36.0	37.8	- 4.8
Sun or glare glasses & sungoggles, ready-made	130.8	93.9	+39.3
Women's, misses' & juniors' scarfs, dickies & neckwear	29.0	nr	--

*Excludes belts made and sold as part of garments.

**Due to a change in reporting methodology, 1972 data on gloves & mittens is not comparable to 1977 data.

nr = not reported.

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series; Current Industrial Reports
MA-23D(79)-1.

SHIPMENTS

Jewelry

The value of U.S. manufacturers' shipments of precious metal and costume jewelry is expected to exceed $3.7 billion in 1981, according to the 1981 U.S. Industrial Outlook. This represents a 5.1% increase over the estimated 1980 shipment value of $3.5 billion. Shipment value of costume jewelry in 1981 is anticipated to be $975 million, a 6% rise from an estimated $920 million in 1980. The rise in the shipment value of precious metal jewelry, 4.8%, will increase shipments to $2.75 billion in 1981 compared to $2.6 billion the previous year.

Value of Shipments by All U.S. Producers of Precious Metal & Costume Jewelry:
Trends & Projections, 1978 - 1981
(Millions of $)

	1981 Forecast	1980 Estimate	1979 Estimate	1978	% Change 1981/1980	% Change 1981/1978
Value of product shipments	$3,725	$3,545	$3,365	$3,072	+ 5.1%	+21.3%
Precious metal jewelry	2,750	2,625	2,500	2,257	+ 4.8	+21.8
Costume jewelry	975	920	865	815	+ 6.0	+19.6

Source: U.S. Department of Commerce,
Industry & Trade Administration,
1981 U.S. Industrial Outlook.

Total value of precious metal and costume jewelry imports in 1980 was an estimated $755 million, down 18.7% from the 1979 jewelry import value of $929 million. While the import value of costume jewelry actually rose slightly during this period, the value of precious metal jewelry imported declined to $600 million from $780 million in 1979, a loss of 23.1%. This drop was attributed to weakened demand for jewelry in the U.S. as gold prices soared. Imports of precious metal jewelry represented 20.2% of domestic consumption in 1980.

However, the export value of jewelry climbed 84.4% in 1980 and reached an estimated $330 million compared to $179 million in 1979, according to the Outlook. The export value of precious metal jewelry more than doubled to $260 million and costume jewelry rose 29.6% to $70 million.

The 1977 Census of Manufactures contains the latest detailed information on shipments of jewelry by type. According to this source, precious metal jewelry rose 94.3% in shipment value between 1977 and 1972. Costume jewelry rose 76.9% in shipment value over the same period.

The census report also covers the shipment value of watches. During the period between 1977 and 1972, the value of watches shipped by U.S. producers increased 61.7%. Detailed information on the value of shipments of precious metal jewelry, costume jewelry and watches is contained in the tables below.

SHIPMENTS

Jewelry

Value of Shipments by All U.S. Producers of Watches & Precious Metal Jewelry, 1972, 1977

(Millions of $)

	Value (Mil.$) 1977	1972	% Change 1977/1972
Jewelry, precious metal, total	$1,907.7	$981.8	+ 94.3%
Jewelry made of platinum metals & karat gold	1,251.5	656.7	+ 90.6
Rings, complete	445.8	358.1	+ 24.5
Wedding rings	133.2	109.2	+ 22.0
Other rings	312.6	248.9	+ 25.6
Ring mountings	69.3	68.0	+ 1.9
Women's & children's jewelry such as necklaces, bracelets, brooches, pins, earrings, etc.	327.8	133.1	+146.3
Bracelets for watches	31.4	21.0	+ 49.5
Organizational jewelry	44.7	25.7	+ 73.9
Other, including men's, religious, cigarette cases, lighters, compacts, vanity cases, etc.	52.3	43.4	+ 20.5
Jewelry, not specified by kind	108.0*	7.4	
Jewelry made of gold filled, rolled goldplate & sterling silver	353.0	178.5	+ 97.7
Rings and ring mountings	35.3	39.5	- 10.6
Men's jewelry	33.0	12.7	+159.8
Women's and children's jewelry	184.3	65.2	+182.7
Bracelets for watches	38.1	32.8	+ 16.1
Other jewelry	38.1	21.8	+ 74.8
Jewelry, not specified by kind	24.1*	6.6	
Other jewelry not specified by kind	303.1	146.6	+106.7
Watches, total	772.0	477.5	+ 61.7
Watches with imported movements or modules	300.7	192.1	+ 56.0
Watches with domestic movements or modules, clock cases and parts	471.3	285.4	+ 65.1

*Due to a change in reporting methodology, 1972 data is not directly comparable to 1977 data in this category.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

SHIPMENTS

Jewelry

Value of Shipments By All U.S. Producers of Costume Jewelry, 1972, 1977
(Value in millions of dollars)

	No. of Companies With Shipments of $100,000 or More	Total Value of Shipments (all Producers)		% Change 1977/1972
	1977	1977	1972	
Costume jewelry, total	na	$781.5	$441.7	+ 76.9%
Base metal:	253	567.5	292.1	+ 94.3
Rings & ring mountings	39	43.3	28.8	+ 50.3
Men's jewelry, excl. watch attachments and rings	22	53.1	29.8	+ 78.2
Women's & children's jewelry, costume novelties	160	402.3	151.6	+165.4
Bracelets for watches	5	43.2	30.5	- 26.3
Fraternal, college & school jewelry	21		28.1	
Other jewelry, including religious	29	25.6	23.3	+ 9.9
Imitation pearls	16	14.3	9.9	+ 44.4
Compact & vanity cases	5	36.2	15.5	+133.5
Other costume jewelry made of plastics, wood, leather, etc.	51	42.0	35.8	+ 17.3
Costume jewelry, not specified by kind	na	121.4	88.4	+ 37.3

na = not available

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC 77-1-39C.

Gloves

Shipments of leather gloves and mittens (both dress and work) had an estimated value of $129 million in 1980, according to the 1981 U.S. Industrial Outlook. In 1981, the shipment value is expected to rise 8.5% to $140 million.

U.S. imports of leather gloves and mittens were an estimated $68.6 million, 0.9% higher than in 1979, with the Philippines the leading exporting country. U.S. exports reached an estimated $15.4 million in 1980, 25% above 1979 export levels.

Estimated Value of Shipments By All U.S. Producers of
Leather Gloves & Mittens, 1978-1981
(Millions of $)

	1981 Forecast	1980*	1979*	1978*	% Change 1981/1980	% Change 1981/1978
Leather gloves & mittens (SIC 3151**)	$140	$129	$159	$121	+ 8.5%	+15.7%

*Estimated
**For a definition of this SIC code, see page 4.

SHIPMENTS

Gloves

Information on the quantity and value of shipments of gloves and mittens is covered on a monthly and an annual basis in the Current Industrial Report (CIR) series issued by the Census Bureau. The data contained in the CIR is not exactly comparable to that found in the census of manufactures because shipments from small companies in the industry, whose data had been derived from administrative records in the census, are estimated in the CIR. These establishments accounted for 2% of the total value of shipments in the 1977 census.

Leather dress and semi-dress gloves and mittens increased 44.6% in shipment value but declined 3.3% in quantity between 1972 and 1977, according to the 1977 Census of Manufactures. Fabric dress and semi-dress gloves gained 26.2% in value and declined 24.1% in quantity during the same five-year period.

Dress and semi-dress gloves and mittens increased 9.1% in shipment value in 1979 compared to 1978 while the quantity shipped rose 5.3%, according to the 1979 annual CIR.

Quantity and Value of Shipments By All U.S. Producers of Gloves and Mittens, 1977-1979

	Quantity (Thous. Doz. Pairs)				Value (Million $)			
	1979	1978	1977	% Change 1979/1978	1979	1978	1977	% Change 1979/1978
Dress & semi-dress gloves & mittens, total	2,719	2,581	2,137	+ 5.3%	$73.2	$67.1	$56.3	+ 9.1%
All knit fabrics, seamless	712	645	628	+10.4	15.1	12.9	9.9	+17.0
All leather	361	409	406	-11.7	27.6	28.1	27.1	- 1.8
Block unit:								
Men's & boys'	107	142	131	-24.6	na	na	na	--
Women's & childrens'	35	39	39	-10.3	na	na	na	--
Other than block cut:								
Men's & boys'	127	143	144	-11.2	na	na	na	--
Women's & childrens'	92	85	92	+ 8.2	na	na	na	--
Leather & fabric combination	290	295	189	- 1.7	14.9	13.3	8.8	+12.0
All woven fabric	(D)	(D)	104	--	(D)	(D)	1.1	
All knit fabric, seamed (cut & sewn)	(D)	(D)	680	--	(D)	(D)	5.7	
Nylon	(D)	(D)	328	--	(D)	(D)	na	
Fabric, excl. nylon	(D)	(D)	352	--	(D)	(D)	na	
Fabric dress & semi-dress gloves & mittens, n.s.k.	112	105	97	+ 6.7	2.3	2.0	1.5	+15.0
Leather dress & semi-dress gloves & mittens, n.s.k.	28	32	33	-12.5	2.2	2.2	2.2	--

na = not available
n.s.k. = not specified by kind.
(D) = withheld by the Census Bureau to avoid disclosing data for individual companies.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Gloves and Mittens MA-23D(79)-1.

SHIPMENTS

Handbags

Handbag and purse shipments were valued at an estimated $559 million in 1980 and are expected to increase 9.1% to $610 million in 1981, according to the 1981 U.S. Industrial Outlook.

The value of 1980 handbag imports were estimated at $375 million, 25% higher than the 1979 value. The countries of Taiwan, Hong Kong, Korea and Italy account for approximately 83% of the 1979 import value.

Estimated Value of Shipments By All U.S. Producers of Women's Handbags & Purses, 1978-1981
(Millions of $)

	1981 Forecast	1980*	1979*	1978*	% Change 1981/1980	% Change 1981/1978
Women's handbags & purses (SIC 3171**)	$610	$559	$518	$528	+ 9.1%	+15.5%

* Estimated.
** For a definition of this SIC code, see page 4.

The latest detailed information on shipments of women's handbags and purses is from the 1977 Census of Manufactures, as shown below.

Quantity and Value of Shipments By All U.S. Producers of Women's Handbags and Purses, 1972, 1977

	Quantity (Million Units)			Value (Million $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Women's handbags and purses, total	na	na	--	$436.2	$344.4	+ 26.6%
All leather and chiefly leather	(S)	7.7	--	109.4	67.2	+ 62.8
Plastics or chiefly plastics	25.1*	64.0	- 60.8%	154.6	196.9	- 21.5
Other materials, except precious metals	(S)	4.6	-	53.2	27.9	+ 90.7
Women's and children's handbags and purses, n.s.k.	na	na	--	119.0	52.4	+127.1

na = not available
n.s.k. = not specified by kind
* A portion of this total has been estimated by the Census Bureau.
(S) = Withheld by the Census Bureau because estimate did not meet publication standards.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Industry Series MC77-1-31B.

SHIPMENTS

Small Personal Leather Goods

Small personal leather goods shipped by U.S. manufacturers in 1980 were valued at an estimated $493 million, a 12% gain over the 1979 shipment value. According to the U.S. Industrial Outlook, the shipment value is projected to rise 11.4% to $549 million in 1981.

An approximate 21% increase was felt in the value of small leather goods imported in 1980 (compared to 1979) to reach an estimated $74 million. Exports increased 14% in value to $8 million over the same one-year period.

Estimated Value of Shipments By All U.S. Producers of Small Personal Leather Goods, 1978-1981
(Millions of $)

	1981 Forecast	1980*	1979*	1978*	% Change 1981/1980	% Change 1981/1978
Small personal leather goods (SIC 3172**)	$549	$493	$440	$403	+11.4%	+36.2%

* Estimated.
** For a definition of this SIC code, see page 4.

The value of shipments of personal leather goods rose 59.3% between 1977 and 1972, according to the recently released 1977 Census of Manufactures.

Value of Shipments By All U.S. Producers of Personal Leather Goods, 1972, 1977

	No. of Companies With Shipments of $100,000 or More	Value of Shipments (Million $) 1977	1972	% Change 1977/1972
Personal leather goods, total	na	$369.2	$231.8	+ 59.3%
Billfolds, wallets, French purses & clutches	na	136.0	93.0	+ 46.2
Leather	26	125.3	78.9	+ 58.8
Other than leather (plastic, fiber, etc.)	6	10.7	14.1	- 24.1
Travel kits (fitted and unfitted)	12	21.9	10.5	+108.6
Jewelry boxes and cases	16	47.1	23.3	+102.1
Other personal goods (key, cigarette, eyeglass and vanity cases, cosmetic bags, etc.)	na	97.9	70.5	+ 38.9
Leather	29	55.8	na	--
Other than leather (plastic, fiber, etc.)	29	42.1	na	--
Small leather goods, n.s.k.	na	66.3	34.5	+ 92.2

n.s.k. = not specified by kind.
na = not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-31B.

SHIPMENTS

Luggage

Estimated shipment value of luggage increased 4% to $665 million in 1980 from $642 million the previous year, according to the 1981 U.S. Industrial Outlook.

Luggage imports rose in value by 4% in 1980 to approximately $238 million. Taiwan accounted for almost 44% of this value. The value of U.S. luggage exports in 1980 was estimated at $54 million, up 10% from 1979, with Saudi Arabia accounting for 25% of this value.

Estimated Value of Shipments by All U.S. Producers of Luggage, 1978-1981
(Millions of $)

					% Change	
	1981 Forecast	1980*	1979*	1978*	1981/ 1980	1981/ 1978
Luggage (SIC 3161**)	$717	$665	$642	$641	+ 7.8%	+11.9%

* Estimated.
** For a definition of this SIC code, see page 4.

Luggage shipments increased 81.8% in value between 1977 and 1972, according to the 1977 Census of Manufactures. Women's hand luggage rose 15.9% in value despite a drop in quantity shipped of 29.7%.

Quantity and Value of Shipments By All U.S. Producers
of Luggage, 1972, 1977

	Quantity (Thous. Units)			Value (Million $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Luggage, total	na	na	--	$585.3	$321.9	+ 81.8%
Women's hand luggage, all types, except zippered	5,123	7,290	- 29.7%	107.2	92.5	+ 15.9
Hard side	(D)	995*	--	(D)	11.6	--
Soft side (lock construction)	1,946	1,855	+ 4.9	35.5	28.7	+ 23.7
Molded (fully or semi-molded)	(D)	4,440	--	(D)	52.2	--
Men's hand luggage, all types, except zippered	2,957	2,569	+ 15.1	65.8	45.9	+ 43.3
Hard side	1,398	307*	--	30.1	6.7	--
Soft side (lock construction)		872*	--		15.8	--
Molded (fully or semi-molded)	1,559	1,390*	+ 12.2	35.7	23.4	+ 52.6
Zippered hand luggage, men's & women's	9,917*	7,237	+ 37.0	147.1	55.9	+164.6
Occupational luggage cases, sample cases, etc.	3,570*	2,503*	+ 42.6	32.5	17.5	+ 85.7
Trunks, hand trunks & lockers	1,620*	990*	+ 63.6	19.3	8.5	+127.1
Briefcases, envelopes, school bags	5,395	1,604*	+236.3	27.8	12.4	+124.2
Attache cases	3,876*	2,065	+ 87.7	58.3	22.1	+163.8
Other (musical instrument cases, etc.)	na	na	--	47.6	26.4	+ 80.3
Luggage, n.s.k.	na	na	--	79.7	41.0	+ 94.4

(footnotes continued on next page)

SHIPMENTS

Luggage

Quantity and Value of Shipments By All U.S. Producers of Luggage, 1972, 1977
(continued)

na = not available.
n.s.k. = not specified by kind.
(D) = Withheld by the Census Bureau to avoid disclosing operations of individual companies.
* = A portion of this quantity has been estimated by the Census Bureau.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-31B.

Belts

The value of apparel belts shipments increased 4.4% between 1977 and 1972. Men's and boys' belts went up 5.3% in value and 8.4% in quantity during this period. Women's and children's belts rose in value at a slower percentage rate, 2.7%. This information, the latest available, is from the 1977 Census of Manufactures.

Quantity and Value of Shipments By All U.S. Producers of Belts, 1972, 1977

	Quantity (Thous. Units)			Value (Million $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Apparel belts, total*	nr	nr	--	$244.3	$234.1	+ 4.4%
Women's & children's belts	72,660	nr	--	71.4	69.5	+ 2.7
Made for sale to apparel firms						
Leather	13,488**	(S)	--	22.2	20.2	+ 9.9
Other	40,536	69,048**	-41.3%	22.1	22.0	+ 0.4
Made for sale separately						
Leather	3,816	8,988	-57.5	10.1	14.8	- 31.8
Other	14,820	(S)	--	17.0	12.5	+ 36.0
Men's & boys' belts	74,172	68,436	+ 8.4	132.7	126.0	+ 5.3
Leather	65,592	59,904**	+ 9.5	119.5	115.8	+ 3.2
Other	8,580	8,532	+ 0.6	13.2	10.2	+ 29.4
Leather belts, n.s.k.	1,584	4,296	-63.1	3.7	7.1	- 47.9
Belts other than leather, n.s.k.	7,860	5,628	+39.7	5.9	2.3	+156.5
Belts, n.s.k.	nr	nr	--	30.6	29.2	+ 4.8

* Excludes belts made and sold as part of garments.
** A portion of this quantity has been estimated by the Census Bureau.
nr = not reported
n.s.k. = not specified by kind.
(S) = Withheld because estimate did not meet Census Bureau standards.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-23D.

SHIPMENTS

Millinery

Between 1977 and 1972, millinery shipments increased 26.4% in value, according to the 1977 Census of Manufactures. A detailed breakdown of millinery shipments is provided below.

Quantity and Value of Shipments By All U.S. Producers of Millinery, 1972, 1977

	Quantity (Thous. Units)			Value (Million $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Millinery, total	na	na	--	$74.2	$58.7	+ 26.4%
Fur-felt & wool-felt millinery	2,580*	2,268	+ 13.8%	12.5	7.0	+ 78.6
Fabric millinery, incl. ribbon & pile fabrics	5,952*	5,460	+ 9.0	12.3	11.4	+ 7.9
All other millinery	1,680*	3,144	- 46.6	14.7	13.4	+ 9.7
Millinery, n.s.k.	na	na	--	34.7	26.9	+ 29.0

na = not available
n.s.k. = not specified by kind
* A portion of this total has been estimated by the Census Bureau.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-23C.

Other Accessories

Quantity and Value of Shipments By All U.S. Producers of Specified Accessories, 1972, 1977

	Quantity (Thous. Units)			Value of Shipments (Million $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Cotton handkerchiefs, except embroidered	77,616	186,924	- 58.5%	$ 27.0	$28.0	- 3.6%
Umbrellas, parasols & canes	nr	nr	--	36.0	37.8	- 4.8
Sun or glare glasses & sungoggles, ready-made*	nr	34.9	--	130.8	93.9	+ 39.3
Women's, misses' & juniors' scarfs, dickies & other neckwear	22,992	nr	--	29.0	nr	--

nr = not reported
* 1972 quantity in millions

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

SHIPMENTS BY STATE

New York State held the largest share of 1977 product shipments in several accessories categories covered by the Census Bureau. The highest share was in the belts, other than leather category, where it was responsible for 64.3% of the total shipment value. Rhode Island led all states in shipment value of jewelry made of precious metal in 1977.

Value of Shipments of Specified Accessories by Leading States, 1972, 1977

	Value of Shipments (Million $)		
	1977	1972	% Change 1977/1972
Jewelry made of platinum metals and karat gold			
United States, total	$1,251.5	$656.7	+ 90.6%
Leading states:			
New York	608.2	338.5	+ 79.7
Massachusetts	105.6	59.5	+ 77.5
Rhode Island	102.1	48.4	+110.9
New Jersey	82.7	51.7	+ 60.0
California	81.9	29.5	+177.6
Texas	63.0	(D)	--
Illinois	31.2	18.9	+ 65.1
Leading states, total	1,074.7	na	
Percent of U.S. total	85.9%	na	
Other jewelry made of precious metals			
United States, total	353.0	178.5	+ 97.8
Leading states:			
Rhode Island	191.0	87.0	+119.5
New York	51.1	28.8	+ 77.4
Massachusetts	33.5	(D)	--
New Mexico	14.8	(D)	--
California	9.5	(D)	--
Leading states, total	299.9	na	
Percent of U.S. total	85.0%	na	
Watches with imported movements or modules			
United States, total	300.7	192.1	+ 56.5
Leading states:			
New York	152.1	133.6	+ 13.8
Percent of U.S. total	50.6%	69.5%	
Watches with domestic movements or modules			
United States, total	471.3	285.4	+ 65.1
Leading states:			
New York	29.5	(D)	--
California	12.1	(D)	--
Pennsylvania	5.6	na	--
Leading states, total	47.2	na	
Percent of U.S. total	10.0%	na	

(continued)

SHIPMENTS BY STATE

Value of Shipments of Specified Accessories by Leading States, 1972, 1977
(continued)

	Value of Shipments (Million $)		
	1977	1972	% Change 1977/1972
Leather belts			
United States, total	$ 155.5	$ 157.9	- 1.5%
Leading states:			
New York	32.2	71.6	- 55.0
Connecticut	23.3	(D)	--
Texas	21.0	5.5	+281.8
California	10.3	(D)	--
Pennsylvania	8.3	(D)	--
Leading states, total	95.1	na	
Percent of U.S. total	61.2%	na	
Belts, other than leather			
United States, total	$ 58.2	$ 46.9	+ 24.1
Leading states:			
New York	37.4	32.8	+ 14.0
Pennsylvania	3.6	na	--
California	3.5	2.2	+ 59.1
Leading states, total	44.5	na	
Percent of U.S. total	76.5%	na	
Fabric dress gloves and mittens (including leather and fabric combination)			
United States, total	26.1	10.6	+146.2
Leading states:			
New York	7.9	4.5	+ 75.6
Percent of U.S. total	30.3%	42.4%	

na = not available

(D) = Withheld by the Census Bureau to avoid disclosing operations of individual companies.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRICE TRENDS

Producer Price Indexes for Specified Accessories, 1979, 1980
(1967 = 100 unless otherwise indicated)

	Annual Average		% Change
	1980(p)	1979	1980/1979
Luggage & small leather goods	172.5	160.1	+ 7.7%
Men's dress gloves, of leather	311.1	272.1	+14.3
Jewelry & jewelry products*	180.8	117.2	+54.3
Jewelry, platinum & karat gold*	218.8	125.9	+73.8
Other precious metal jewelry*	163.1	112.1	+45.5
Costume jewelry*	110.8	103.2	+ 7.4
Watches & clocks	176.3	160.8	+ 9.6

*Dec. 1978 = 100.
(p) = preliminary

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

U.S. imports of jewelry, costume and precious metal, rose 40.4% in value ($918.6 million) in 1979 compared to 1978. Precious metal jewelry accounted for most of this increase with a 47.1% gain to an import value of $786.9 million versus the 1978 value of $535.1 million.

Imported gloves and glove linings of all types rose an overall 24.0% in value, spurred by a 41.6% rise in the value of imported horsehide and cowhide gloves.

Several categories of imported accessories declined in quantity and value in 1979 compared to 1978. Mufflers and scarfs fell 21.2% in value and handkerchief imports experienced the largest declines in both value and quantity. Handbags, watches and watch movements also were among the categories which declined in import value in 1979.

Import statistics for the year 1980 will be available from the Census Bureau in mid-1981. Currently, the most recent import information covers the 1980 period from January to October. The following table compares the quantity and value of accessory imports in this period with the same ten-month period in 1979.

In 1980 so far, the import value of all types of jewelry is 24.8% less than it was in the January to October 1979 period. Gloves and glove linings, another strong import category in 1979, is 15.1% below the 1979 value in 1980. The largest gain in import value over this period is in flat goods.

FOREIGN TRADE

Imports

Summary of U.S. Imports of Specified Accessories, October 1979, 1980

(Quantity in thousands of units, unless otherwise indicated)

	Quantity			Value* (Mil. $)		
	Oct. 1980	Oct. 1979	% Change 1980/1979	Oct. 1980	Oct. 1979	% Change 1980/1979
Jewelry & religious articles, total	--	--	--	$529.5	$704.1	- 24.8%
Watches & watchcases, total	51,273.6	41,173.0	+ 24.5%	581.7	475.2	+ 22.4
Watch movements, total	6,107.8	6,198.1	- 1.5	60.1	70.0	- 14.1
Watch bracelets, total	2,787.4	2,609.4	+ 6.8	45.4	41.0	+ 10.7
Handbags, reported separately, total	117,704.2	94,873.2	+ 24.1	319.8	265.4	+ 20.5
Handbags & luggage, reported together, total	93.9	143.0	- 34.3	2.8	3.3	- 15.1
Handbags, flat goods & luggage, reported together, total	--	--	--	5.5	5.0	+ 10.0
Luggage, reported separately, total	--	--	--	228.9	216.6	+ 5.7
Flat goods, reported separately, total	--	--	--	69.8	56.6	+ 23.3
Gloves & glove linings, total	--	--	--	158.0	187.9	- 15.9
Mufflers, scarfs & shawls, etc., total	--	--	--	25.7	33.5	- 23.3
Handkerchiefs, total	36,239.9	30,031.7	+ 20.7	11.8	10.9	+ 8.3
Headwear, total	--	--	--	88.3	72.1	+ 22.5
Leather belts, total	--	--	--	24.9	25.1	- 0.8
Sunglasses & sungoggles, valued over $2.50 per doz.(thous.doz.)	4,572.6	4,959.8	- 7.8	86.8	85.9	+ 1.0
Umbrellas	29,837.4	30,551.5	- 2.3	48.4	48.1	+ 0.6

*The c.i.f. value is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135,
October 1979, 1980.

Imports

U.S. Imports of Specified Accessories, 1978, 1979
(Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. value* (Mil. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Jewelry & religious articles, total	--	--	--	$918.6	$654.3	+ 40.4%
Nonprecious metal jewelry	--	--	--	100.8	97.7	+ 3.2
Precious metal jewelry	--	--	--	786.9	535.1	+ 47.1
Precious stones and pearls	--	--	--	30.9	21.5	+ 43.7
Watches & watchcases, total	49,437.6	52,614.2	- 6.0%	575.3	594.5	- 3.3
Not over 7 jewels	31,100.5	29,732.4	+ 4.6	394.2	374.0	+ 5.4
8-17 jewels	3,648.4	5,327.0	- 31.5	113.3	152.8	- 25.8
Over 17 jewels	175.5	210.6	- 16.7	39.9	33.5	+ 19.1
Watchcases	14,512.2	17,344.2	- 16.3	27.9	34.2	- 18.4
Watch movements, total	10,337.1	10,615.3	- 2.6	129.1	133.3	- 3.1
Not over 1 jewel	4,775.0	4,330.2	+ 10.3	42.7	40.4	+ 5.7
2-7 jewels	655.8	1,246.9	- 47.4	11.2	13.6	- 17.6
8-15 jewels	25.7	14.0	+ 83.6	0.4	0.4	--
16-17 jewels	1,778.0	1,506.3	+ 18.0	25.9	24.8	+ 4.4
Over 17 jewels	9.4	14.7	- 36.0	1.0	0.6	+ 66.7
Watch bracelets of nonprecious materials, total	3,093.2	3,503.2	- 11.7	47.9	53.5	- 10.5
Handbags (separately reported), total	118,555.4	138,950.3	- 14.7	328.8	245.5	- 4.8
Nonreptile leather	16,858.2	20,553.7	- 18.0	134.1	135.2	- 0.8
Plastic,(other than reinforced or laminated plastic), nspf	46,079.8	44,652.5	+ 3.2	97.3	88.3	+ 10.2
Textile material, nspf	50,937.1	66,754.5	- 23.7	87.6	108.1	- 19.0
Beads, imitation gemstones, etc.	1,509.4	1,886.7	- 20.0	2.4	3.0	- 20.0
Paper yarns	57.6	92.6	- 37.8	0.2	0.3	- 33.3
Materials, nspf	3,113.3	5,010.3	- 37.9	7.2	10.6	- 32.1
Handbags & luggage, of reptile leather, total	161.1	145.4	+ 10.8	4.0	3.2	+ 25.0
Handbags, flat goods & luggage (reported together), total	--	--	--	6.0	5.5	+ 9.1
Reinforced or laminated plastic (thous. pounds)	501.0	451.3	+ 11.0	2.0	1.8	+ 11.1
Textile material, in part braid or handloomed	--	--	--	4.0	3.7	+ 8.1

(continued)

Imports

U.S. Imports of Specified Accessories, 1978, 1979
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			C.I.F. Value* (Mil. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Luggage (separately reported), total	--	--	--	$256.7	$230.4	+ 11.4%
Nonreptile leather	--	--	--	34.5	28.8	+ 20.0
Textile material, nspf	--	--	--	65.8	50.8	+ 29.5
Materials, nspf	--	--	--	156.4	150.8	+ 3.7
Flat goods (billfolds, key cases, etc.) (separately reported), total	--	--	--	69.8	67.6	+ 3.2
Leather, nspf	--	--	--	32.5	29.3	+ 10.9
Textile materials, nspf	--	--	--	14.6	14.0	+ 4.3
Materials, nspf	--	--	--	22.7	24.3	- 6.6
Gloves & glove linings, total	--	--	--	278.0	224.2	+ 24.0
Gloves, horse or cowhide, total (thous. dozen pairs)	6,538.0	5,324.7	+ 22.8%	109.3	77.2	+ 41.6
All leather	2,224.0	1,766.7	+ 25.9	53.1	40.7	+ 30.5
Not wholly leather	4,314.8	3,558.0	+ 21.3	56.2	36.5	+ 54.0
Gloves, of leather, nspf, total (thous. dozen pairs)	304.0	289.0	+ 5.2	18.0	16.3	+ 10.4
Men's	116.0	102.1	+ 13.6	6.2	5.1	+ 21.6
Lined	79.5	73.8	+ 7.7	4.3	3.7	+ 16.2
Not lined	36.5	28.3	+ 28.9	1.9	1.4	+ 35.7
Women's or children's	188.0	186.9	+ 0.6	11.8	11.2	+ 5.4
Lined	167.3	163.4	+ 2.4	10.7	9.9	+ 8.1
Not lined	20.7	23.5	- 11.9	1.1	1.3	- 15.4
Other gloves & glove linings, total (thous. dozen pairs)	--	--	--	150.7	130.7	+ 15.3
Knit	--	--	--	93.3	76.6	+ 21.8
Cotton	5,187.4	4,151.0	+ 25.0	13.4	9.9	+ 35.3
Textile materials, nspf	187.0	232.1	- 19.4	3.2	2.5	+ 28.0
Man-made fibers	1,069.2	829.6	+ 28.9	4.4	4.2	+ 4.8
Materials, nspf	--	--	--	72.3	60.0	+ 20.5
Not knit	11,157.6	11,293.1	- 1.2	57.4	54.1	+ 6.1
Man-made fibers	3,661.1	4,627.9	- 20.9	33.5	34.6	- 3.2
Other textile materials	7,496.5	6,665.2	+ 12.5	23.9	19.5	+ 22.6

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Specified Accessories, 1978, 1979
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			C.I.F. Value* (Mil. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Mufflers, scarfs & shawls, etc., not knit, total	--	--	--	$ 39.0	$ 49.5	- 21.2
Cotton	502.8	1,092.1	- 54.0	0.9	2.2	- 59.1
Vegetable fibers, not cotton	4.5	28.6	- 84.3	0.02	0.1	- 80.0
Wool	2,627.4	4,049.5	- 35.1	7.7	10.5	- 26.7
Silk, not ornamented	3,256.3	3,680.0	- 11.5	14.0	13.6	+ 2.9
Man-made fibers	19,594.5	30,457.8	- 35.7	15.3	22.2	- 31.1
Textile materials (thous pounds)	17.6	22.2	- 20.7	1.1	0.9	+ 22.2
Handkerchiefs, total	36,283.1	45,248.5	- 19.8	13.2	17.9	- 26.3
Cotton	27,891.6	28,244.0	- 1.6	6.8	7.0	- 2.9
Silk	1,772.3	2,363.6	- 25.0	3.0	3.7	- 18.9
Vegetable fibers, not cotton	1,804.7	2,350.0	- 23.2	0.9	1.0	- 10.0
Textile materials	4,814.5	12,190.9	- 60.5	2.5	6.2	- 60.0
Headwear, total	--	--	--	87.1	76.2	+ 14.3
Vegetable material, paper & man-made fibers, nspf	--	--	--	25.5	22.4	+ 13.8
Wool, except felt	3,335.0	4,507.0	- 26.0	7.6	8.9	- 14.6
Textile material, except wool, nspf	--	--	--	32.8	24.7	+ 32.8
Fur not on the skin, men's & boys'	221.6	383.9	- 42.3	2.4	2.6	- 7.7
Felt & fur not on the skin	--	--	--	1.7	1.2	+ 41.7
Headband & reinforced plastic headwear or hardhats, nspf	--	--	--	17.1	16.4	+ 4.3
Leather belts, total	--	--	--	30.6	26.4	+ 15.9
Sunglasses & sungoggles, valued over $2.50 per doz. (thous. doz.)	5,794.7	5,993.2	- 3.3	102.2	102.2	--
Umbrellas	37,095.4	43,279.1	- 14.3	58.7	58.7	--

nspf = not specially provided for

* The c.i.f. value is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135,
December 1978, 1979.

FOREIGN TRADE

Exports

U.S. exports of jewelry (both costume and precious metal) rose 8.4% to $178.8 million in 1979 compared to $165.0 million in 1978. Exports of jewelry made from semiprecious and precious stones more than doubled in value during this period.

The quantity of leather handbags exported also doubled from 1978 to 1979. Overall, the handbag classification rose 41.6% in quantity, the highest increase among accessory items, and 14.7% in value.

U.S. Exports of Specified Accessories, 1978-1979
(Quantity in thousands of units, unless otherwise indicated)

	Quantity			Value* (Mil. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Jewelry, total	--	--	--	$178.8	$165.0	+ 8.4%
Nonprecious metal jewelry	--	--	--	53.6	46.0	+ 16.5
Platinum or gold jewelry	--	--	--	28.7	66.0	- 56.5
Rolled precious metals or sterling silver jewelry	--	--	--	12.9	14.4	- 10.4
Semiprecious & precious stones & pearls	--	--	--	83.6	38.6	+116.6
Watches, watchcases & watch movements, total	--	--	--	49.7	72.9	- 31.8
Watches	1,428.0	2,543.8	- 43.9%	25.8	30.9	- 16.5
Watchcases, including parts	--	--	--	17.8	24.5	- 27.3
Watch movements	4,009.4	3,185.9	+ 25.8	6.1	17.5	- 65.1
Handbags, total	3,170.3	2,239.5	+ 41.6	10.9	9.5	+ 14.7
Leather	167.5	78.0	+114.7	2.1	2.2	- 4.5
Plastics	2,159.0	1,206.8	+ 78.9	3.6	3.0	+ 20.0
All other materials	843.8	954.7	- 11.6	5.2	4.3	+ 20.9
Flat goods, total	--	--	--	6.7	5.9	+ 36.7
Leather	--	--	--	3.1	1.8	+ 72.2
Non-leather	--	--	--	3.6	3.1	+ 16.1
Luggage, total	--	--	--	46.8	40.6	+ 15.3
Gloves & glove linings, total (thous. dozen pairs)	3,663.5	3,079.5	+ 19.0	26.3	21.4	+ 22.9
Cotton	1,141.8	898.0	+ 27.1	4.4	3.3	+ 33.3
Wool	11.5	12.9	- 10.8	0.2	0.1	+100.0
Man-made fibers	443.5	460.8	- 3.7	2.4	2.4	--
All other textile materials	283.7	205.1	+ 38.3	2.4	2.0	+ 20.0
Leather or fur on the skin	543.2	619.8	- 12.4	12.3	10.8	+ 13.9
Materials, nspf	1,239.8	882.9	+ 40.4	4.6	2.8	+ 64.3

nspf = not specified by kind

* The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of export, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports, FT 410,
December 1979, 1978.

FASHION ACCESSORIES

At the Retail Level

THE SIZE OF THE POTENTIAL MARKET

Total Population of the U.S., 1979 & Projections* to 2000
(In Thousands)

	1979	1985	2000	% Change 2000/1979	% of Total Population 1979	1985	2000
Total, all ages	220,584	232,880	260,378	+ 18.0%	100.0%	100.0%	100.0%
Under 16 years	54,293	55,273	61,053	+ 12.4	24.6	23.7	23.4
16 years & over	166,291	177,608	199,325	+ 19.9	75.4	76.3	76.6
16-19 years	16,837	14,364	15,679	- 6.9	7.6	6.2	6.0
20-34 years	55,751	60,369	51,348	- 7.9	25.3	25.9	19.7
35-49 years	36,358	42,902	60,334	+ 65.9	16.5	18.4	23.2
50-64 years	32,687	32,668	40,142	+ 22.8	14.8	14.0	15.4
65 years & over	24,658	27,305	31,822	+ 29.0	11.2	11.7	12.2
Median age in years	30.0	31.5	35.5				

Male Population of the U.S., 1979 & Projections* to 2000
(In Thousands)

	1979	1985	2000	2000/1979	% of Male Population 1979	1985	2000
Total, all ages	107,457	113,366	126,558	+ 17.8%	100.0%	100.0%	100.0%
Under 16 years	27,724	28,288	31,296	+ 12.9	25.8	25.0	24.7
16 years & over	79,733	85,078	95,291	+ 19.5	74.2	75.0	75.3
16-19 years	8,548	7,290	7,993	- 6.5	8.0	6.4	6.3
20-34 years	27,837	30,142	25,662	- 7.8	25.9	26.6	20.3
35-49 years	17,749	20,976	29,556	+ 66.5	16.5	18.5	23.3
50-64 years	15,582	15,659	19,364	+ 24.3	14.5	13.8	15.3
65 years & over	10,017	11,013	12,716	+ 26.9	9.3	9.7	10.0
Median age in years	28.8	30.3	34.1				

Female Population of the U.S., 1979 & Projections* to 2000
(In Thousands)

	1979	1985	2000	2000/1979	% of Female Population 1979	1985	2000
Total, all ages	113,128	119,514	133,790	+ 18.3%	100.0%	100.0%	100.0%
Under 16 years	26,569	26,986	29,758	+ 12.0	23.5	22.6	22.2
16 years & over	86,559	92,528	104,032	+ 20.2	76.5	77.4	77.8
16-19 years	8,290	7,074	7,686	- 7.3	7.3	5.9	5.7
20-34 years	27,914	30,226	25,686	- 8.0	24.7	25.3	19.2
35-49 years	18,609	21,926	30,779	+ 65.4	16.4	18.4	23.0
50-64 years	17,105	17,008	20,777	+ 21.5	15.1	14.2	15.3
65 years & over	14,641	16,293	19,103	+ 30.5	12.9	13.6	14.3
Median age in years	31.5	32.7	36.8				

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, Nos. 714 (July 1977)
& No. 870 (January 1980).

THE SIZE OF THE POTENTIAL MARKET

Between 1979 and 2000, according to present Census Bureau forecasts, the number of adults in the U.S., aged 35-49 will increase 65.9% as the "baby boom" generation comes of age. Thus, this increase will be felt almost equally among men and women. Overall, it is expected that there will be 19.9% more Americans aged 16 and over by the year 2000.

These forecasts show that many more Americans will be entering their prime earnings years, where their purchasing power will exert a strong influence over many commodities, including apparel. This is good news for accessories manufacturers and retailers as sales can be expected to climb upward due to the rise in disposable income.

THE BRIDAL MARKET

The total number of marriages in the U.S. is expected to increase in 1980, marking the fifth straight year their number has increased. As of November, the 11 month total for 1980 is 1.9% ahead of the similar time period in 1979. The National Center for Health Statistics estimates the 1980 marriage rate at 10.9 per 1,000 population, slightly ahead of 1979.

Total Marriages in the U.S., 1977-1979 & January-November 1980

	Jan.-Nov.		Annual Totals			Rate Per 1,000 Persons		
	1980	1979	1979	1978	1977	1979	1978	1977
Total number of marriages	2,219	2,178	2,317	2,243	2,178	10.5	10.3	10.1

Source: U.S. Department of Health, Education & Welfare, National Center for Health Statistics.

This rise in the number of marriages provides a ready market for many accessories items, most notably jewelry and luggage. An estimated 75% of first time brides receive diamond engagement rings as do 50% of brides being remarried. The average price paid in 1979 was $585, according to National Family Opinion, a market research firm.

Trade sources indicate the average bride spent approximately $170 on luggage and accounted for almost 25% of the total women's luggage market.

Recent statistics from the Census Bureau show men and women are marrying at an older age than they once did. In 1979, the median age for a first-time bride was 22.1 years of age; for a man it was 24.4 years. This trend towards delaying marriage until later also has potentially good implications for the accessories market. At the age of first marriage, most persons will have started on their careers and thus have more income to dispose of than previously.

RETAIL SALES

By Type of Accessory

Fashion accessories encompass a variety of products such as jewelry, handbags, hats and scarfs. Although the fashion accessories business constitutes a substantially large market, involving billions of dollars, there are problems in reporting an accurate estimate on the total value of fashion accessories at the retail level. Fashion items are subject to the unpredictability of consumer choice and to the amount of discretionary income the consumer decides to allocate to them.

According to the latest figures from the Department of Commerce, personal consumption expenditure for all clothing and accessories (not including footwear) amounted to $87.6 billion in 1979. Spending by the nation's consumers for women's/children's and men's/boys' clothing and accessories amounted to $54.0 and $28.6 billion, respectively.

Detailed information on men's neckwear, hats and underwear is contained in the Men's Furnishings & Work Wear Fact File. Information on men's and women's hosiery is detailed in the Bodywear, Legwear/Hosiery Fact File.

Jewelry

The Department of Commerce reported 1979 personal consumption expenditures for all types of men's and women's jewelry and watches reached $9.7 billion, an 8.6% increase over 1978 expenditures.

Personal Consumption Expenditures for Jewelry and Watches, 1977-1979
(Millions of $)

				% Change	
	1979	1978	1977	1979/ 1978	1979/ 1977
Jewelry & watches, total	$9,677	$8,910	$7,842	+8.6%	+23.4%

Faced with record high gold prices, inflationary/recessionary pressures and credit restraints, consumers turned away from buying fine jewelry in 1980. However, while unit sales in 1980 were down from 1979 levels, dollar sales were expected to show small increases due to the number of persons who bought expensive jewelry as investments. Although gold prices have come down somewhat, 1981 is not expected to register significant increases in either unit or dollar sales.

Rising prices in fine jewelry caused many consumers to "trade-down" to costume jewelry, and 1981 prospects for this segment of the jewelry industry are more promising. Recognizing this trend, jewelry manufacturers are producing more gold-filled pieces, lighter-weight karat gold and hollow chains for sale in 1981.

Colorful jewelry items made of semiprecious stones were among the more popular items in both 1979 and 1980. They are expected to sell well again in 1981 as consumers switch away from gold and toward more colorful fashion accessories to enhance their wardrobe.

RETAIL SALES

By Type of Accessory

Handbags

Although leather prices have remained relatively stable over the past three years, the price of a leather handbag continues to rise to levels out of the reach of many consumers. Average prices for these bags now approach $70. To combat consumer buying resistance, handbag manufacturers are turning to other fabrications and new colors to lure customers. In 1980, straw, canvas and so-called feather leather (soft vinyl which looks and feels like leather) bags were among the best sellers. Exotic colors such as peach, plum, opal and barley were offered along with different shades of blue to maintain consumer interest. Retail sales of handbags and small leather goods in 1979 were estimated at between $1.7 billion and $2.1 billion.

A national survey conducted for the National Handbag Association in 1979 found that 45% of handbags bought in 1978 were not made of leather. Department stores were the most frequent place of purchase. Half of all handbags bought were shoulder bags. (For more complete information on this study, see the Consumer Buying Habits section.)

Belts

Belts have not suffered in the tight economy as much as some accessories have primarily because men have continued to buy belts to update their current wardrobes rather than buy new ones, and they have become an important fashion accessory for women with the growing popularity of skirts and dresses. Innovative use of colors and fabrics such as nylon, wool and cotton in fashion belts have also helped, but leather dress belts are still the mainstay of the industry. Classic European belt stylings utilizing leather and suede with traditional buckle treatments contributed heavily to total sales. Industry estimates are that fashion belts will grow to approximately 25-30% of sales.

Luggage

With more and more Americans taking advantage of their increased amount of leisure time to travel, luggage sales have enjoyed several good years. Current consumer preference is for soft-sided luggage such as totes, carry-ons, garment bags and satchels. In the last six years, designer-name luggage has become a large part of the luggage market, featuring luggage made of vinyl, gabardine, rayon and nylon. Manufacturers are using less leather than before to match the consumer demand for lightweight luggage with an elegant look. Sales of briefcases and attaches are also growing.

Millinery

While it is difficult to place an exact total on the size of the millinery market at retail, 1979 sales were estimated at between $350-$400 million. This represents a dramatic turnaround from a decade ago, when the industry was close to extinction. Fortunately for the industry, the fashion pendulum swung back in favor of hats and sales increased. Another big reason for the acceptance of hats is the trend toward western wear. A prime component of the western look is a hat; and cowboy hats made of felt and straw are selling exceptionally well to women, according to the Millinery Institute of America. Evidence of the damage exposed skin can incur from the sun has also sparked interest in wide-brimmed hats among women. Hats are now part of the main floor accessories department rather than their previous restriction to the millinery department only.

RETAIL SALES

By Type of Retail Outlet

The 1977 Census of Retail Trade contains the only official information available on sales of men's and women's accessories in various types of retail outlets with payrolls. Not all store types broke out sales in detail, but the following information reflects sales in major outlet types. Comparative sales figures for prior census years are not available due to changes in the merchandise classification system.

Men's Accessories

Sales of men's accessories reported by leading outlet types amounted to a total of $1.2 billion in 1977. Department stores accounted for $704.4 million, or 59.3% of this total.

Reported Sales of Men's Accessories by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's accessories (Hats, gloves, belts, wallets, umbrellas, etc.)	36,426	100.0%	$1,187.0	100.0%
Department stores**	7,244	19.9	704.4	59.3
Men's wear stores	14,696	40.3	307.4	25.9
Family clothing stores	10,246	28.1	135.9	11.5
Other (women's ready-to-wear stores, men's shoe stores & mail order houses)	4,240	11.6	39.3	3.3

* Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

** Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

Percent of Total Men's and Boys' Wear Sales Accounted For By Men's Accessories Sales in Key Store Types, 1977

	Total Men's & Boys' Wear Sales* (Mil. $)	% of Total Accounted For By Men's Accessories
Department stores**	$10,574.9	6.7%
Men's wear stores	6,275.4	4.9
Family clothing stores	3,001.5	4.5

*Excludes men's & boys' footwear sales
**See footnote for the preceding table

Source for both tables:
U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

RETAIL SALES

By Type of Retail Outlet

Women's handbag and small leather goods sales reported by the major outlet types reached $1.2 billion in 1977. Of this total, department stores accounted for 56.1%, or $667.9 million.

Department stores were responsible for 73.6% of the $232.5 million in sales of women's hats, hairpieces and trimmings in the major outlet types during 1977, according to the census reports. In reported sales of other women's accessory items such as gloves, neckwear, belts and umbrellas, department stores accounted for 54.8% of the $977.5 million volume done by the major store types.

However, it should be noted that these accessories are also sold in other outlet types (variety stores, supermarkets, as well as specialized accessory stores, sporting good stores, etc.) for which sales are not available.

Reported Sales of Specified Women's Accessories by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's handbags & small leather (and plastic) goods	46,765	100.0%	$1,190.5	100.0%
Department stores**	7,727	16.5	667.9	56.1
Women's ready-to-wear stores***	18,311	39.2	234.3	19.7
Family clothing stores	8.972	19.2	96.2	8.1
Shoe stores	8,450	18.1	126.5	10.6
Mail order houses	3,305	7.1	65.6	5.5
Women's hats, hairpieces & trimmings	12,982	100.0	253.0	100.0
Department stores**	5,557	42.8	171.1	67.6
Women's ready-to-wear stores**	4,524	34.8	40.8	16.1
Millinery stores	256	2.0	20.5	8.1
Family clothing stores	2,299	17.7	14.4	5.7
Mail order houses	346	2.7	6.2	2.5
Women's accessories (gloves, neckwear, belts, umbrellas, etc.)	40,585	100.0	977.5	100.0
Department stores**	7,120	17.5	536.0	54.8
Women's ready-to-wear stores***	20,657	50.9	306.4	31.4
Family clothing stores	8,848	21.8	103.0	10.5
Other stores (men's wear stores, shoe stores & children's wear stores)	938	2.3	12.9	1.1
Mail order houses	3,022	7.5	19.2	2.0

* and ** See footnotes on table of men's accessories sales.

*** Does not include sales in women's accessory and specialty stores (handbag stores, glove stores, etc.) Sales in these stores totaled $494.5 million in 1977, in 2,937 outlets with payrolls.

RETAIL SALES

By Type of Retail Outlet

Percent of Total Women's and Children's Wear Sales Accounted For By Sales of Specified Accessories in Key Store Types, 1977

	Total Women's & Childrens' Wear Sales* (Mil. $)	% Accounted For By: Handbags, Small Leather Goods	Hats, Hair-pieces	Accessories (gloves, belts, etc.)
Department stores**	$ 16,250.7	0.9%	0.2%	0.7%
Women's ready-to-wear stores***	11,066.5	1.9	0.3	2.5
Family clothing stores	3,471.6	1.2	0.2	1.3

* Excludes women's and children's footwear sales.
** See footnote on table of men's accessories sales, page 36.
*** Does not include sales in women's accessory and specialty stores.

Source for both tables: Based on U.S. Bureau of the Census
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

Jewelry

Men's and women's jewelry sales in the major store types were reported at $8.15 billion in 1977, according to the census of retail trade. In this report, jewelry sales include not only both precious metal and costume jewelry, but also watches. As previously noted, not all store types broke out sales in detail; therefore, sales of jewelry in supermarkets and other type stores are not included in the table below.

Reported Sales of Jewelry by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Jewelry	110,575	100.0%	$8,150.8	100.0%
Department stores**	8,355	7.6	1,753.9	21.5
Women's wear stores	9,546	8.6	156.2	1.9
General merchandise stores (except variety & department)	7,107	6.4	675.9	8.3
Jewelry stores & miscellaneous stores	27,828	25.2	4,465.0	54.7
All other store types	53,779	48.6	739.3	9.1
Non-store retailers (mail order houses & direct selling)	3,960	3.6	360.5	4.4

(See footnotes on table of men's accessories sales, page 36.)

RETAIL SALES

By Type of Retail Outlet

Percent of Total Store Sales Accounted for by Jewelry Sales In Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Accounted For By Jewelry
Department stores**	$76,909.4	2.3%
Women's wear stores	13,163.8	1.1
General merchandise stores (except variety & department stores)	9,597.7	7.0
Jewelry stores	5,010.5	85.6

**See footnote on table of men's accessories sales, page 36.

Source for both tables: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

Luggage

According to data released by Samsonite, one of the leading luggage manufacturers in the U.S., national chains accounted for 24.3% of the retail dollar volume spent for luggage in 1979. Department stores had almost 21% of total dollar volume.

Percent of Unit and Dollar Sales of Luggage by Store Type, 1979

	1979	
	% of Units	% of $
Total	100.0%	100.0%
National chains	23.0	24.3
Discount stores	20.6	20.0
Department stores	18.4	20.9
Luggage stores	6.9	9.8
Mail order	10.7	7.2
Other	20.4	17.8

Source: Stores Magazine
(March 1981).

RETAIL SALES

By Type of Retail Outlet

Merchandising and operating results in three major store types selling accessories are reported below. Data on the total number of stores in 1977 and their total sales of all merchandise in recent years are also shown.

Trends in Total Sales, 1977-1980

	Number	Sales (Mil. $)
Department stores		
1980(p)	na	$94,826
1979	na	88,520
1977	8,807	76,909
Women's ready-to-wear stores		
1980(p)	na	15,706
1979	na	14,969
1977	44,894	12,444
Men's wear stores		
1980(p)	na	9,001
1979	na	7,830
1977	22,683	6,943

(p) = preliminary
na = not available

RETAIL OPERATING RATIOS

Department Stores

Accessories Departments in Department Stores, 1979
Selected Typical (Median) 1977 Merchandising & Operating Results in Department Stores with Total Annual Sales Over $1 Million

	Women's Accessories						
	Fine Jewelry/ Watches (43)#	Costume Jewelry (100)#	Gloves (86)#	Handbags Small Leather Goods (112)#	Men's Access.** (44)#	Misc. Apparel/ Access.* (116)#	Luggage (117)#
Net sales % change from last year	+ 21.6%	+ 5.3%	+ 2.7%	+ 8.0%	+ 6.0%	+ 2.5%	+ 6.1%
Sales % to total store	1.1	1.5	0.5	1.4	1.0	0.7	0.5
Net sales % of merchandise division***	11.7	15.8	4.9	14.4	9.8	7.2	21.5
$ sales per square foot of selling space	$360.0	$209.1	$171.2	$147.8	$226.9	$112.3	$ 81.4
Cumulative markon %	48.6%	52.6%	52.0%	51.6%	51.0%	52.4%	48.7%
Gross margin, % of sales	45.0	48.5	50.2	48.1	49.4	48.1	44.1
Markdown, % of sales	5.2	6.3	6.4	8.7	4.0	11.7	7.9
Returns, % of sales	9.7	4.5	6.3	8.1	5.1	6.3	7.4
Number of stock turns	2.1	2.9	3.9	3.8	3.1	3.0	2.0
Salespeople's salaries, % of sales	9.2%	9.1%	8.3%	8.9%	6.2%	8.9%	8.4%
Sales promotion, % of sales	3.0	3.1	2.2	2.6	2.7	3.2	4.0

nr = not reported

* Other apparel accessories include neckwear and scarfs, handkerchiefs, umbrellas and belts.

** Men's accessories include ties, handkerchiefs, jewelry and small leather goods, umbrellas, gloves and mufflers.

*** Merchandise division (equal to 100%) for women's accessories is adult female accessories and intimate apparel; for men's accessories it is adult male apparel; for luggage it is hobby and recreation.

Number in parenthesis refers to the number of stores reporting in each category.

Source: National Retail Merchants Association,
"Merchandising and Operating Results,"
1980 Edition.

RETAIL OPERATING RATIOS

Women's Specialty Stores

Women's Accessories Departments in Specialty Stores, 1979
Selected Typical (Median) Merchandising & Operating Results
(Specialty Stores with Total Volume over $1 Million)

	Total Store (52)*	All Jewelry & Watches (26)*	Gloves (15)*	Handbags & Small Leather Goods (23)*	Misc. Apparel Accessories (31)*
Net sales, % change from last year	+ 6.1%	+ 3.0%	+ 3.8%	+ 3.8%	+ 3.0%
Sales, % of total store	100.0	1.6	0.6	1.8	1.3
Net sales, % of mdse. div	--	17.6	5.7	20.9	12.7
$ sales per square foot of selling space (main or largest selling unit)	$146.3	$196.5	$164.0	$147.0	$155.2
Cumulative markon, %	50.5	52.5	51.7	51.1	52.5
Gross margin (incl. cash discounts), % of sales	42.7	44.5	51.7	43.1	46.8
Markdowns (incl. employee discounts), % of sales	19.4	12.6	6.5	15.8	16.7
Number of stock turns	3.1	2.5	3.6	3.9	3.2
Selling salaries, % of sales (Main or largest selling unit)	7.2	nr	nr	nr	nr
Sales promotion costs, % of sales	2.3	2.8	nr	nr	1.6

nr = not reported
* Number in parenthesis refers to the number of reporting firms in each category.
NOTE: Miscellaneous apparel accessories include neckwear, scarfs, handkerchiefs, umbrellas and belts.

Source: National Retail Merchants Association, "Merchandising and Operating Results," 1980 Edition.

Men's Wear Stores

Selected Median Merchandising & Operating Experiences in Men's Wear Stores, 1979

	Total Store	Men's Accessories	Men's Belts
% change in sales from last year	+ 3.7%	+ 3.9%	+ 1.4%
% to total store sales	100.0	2.3	1.0
% of total sales within men's furnishings classification	--	13.6	5.8
% distribution of average inventory within men's furnishings classification	100.0	15.4	5.8
Stock turnover (number of times)	1.8	1.7	1.8

Source: Menswear Retailers of America, 1979 Annual Business Survey.

RETAIL PROMOTIONS

Seasonality in Newspaper Advertising Linage of Women's Accessories & Luggage
Percent of Year's Total Linage Used Each Month
(Five-year Average, 1971-1975)

	Costume Jewelry	Gloves	Handbags	Hats & Trimmings	Luggage
Total linage	100.0%	100.0%	100.0%	100.0%	100.0%
January	4.5	7.7	4.6	7.0	4.8
February	6.7	4.7	5.9	5.9	7.1
March	7.7	5.9	9.9	11.4	5.4
April	8.0	5.4	9.5	7.7	6.5
May	9.3	3.5	10.5	4.8	11.9
June	4.8	1.1	5.8	3.8	12.1
July	5.0	1.1	5.3	2.3	6.7
August	7.6	1.9	8.6	5.8	11.3
September	8.5	5.7	9.2	8.4	5.1
October	9.3	16.4	8.9	11.9	5.8
November	12.2	23.0	10.3	15.1	9.9
December	16.4	23.6	11.5	15.9	13.4

Source: The Advertising Checking Bureau, Inc.—Neustadt Reports Div., covering retail newspaper advertising linage in all newspapers in seven cities: Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles and Washington.

CONSUMER BUYING HABITS

Men's Accessories

A men's accessories survey conducted by DNR Infact (July 16, 1980) among 85 department and men's specialty store accessory buyers found that only 14% thought their accessories sales had decreased in 1979 as a percentage of total men's department sales. The percentage contribution of accessories increased according to 47% of the survey, while 39% thought it had remained the same.

When asked which accessory item had shown the most growth over the past year, over half mentioned jewelry.

"Which Accessory Item Has Shown the Most Growth Over the Past Year?"

	% of Total
Total respondents	100%
Jewelry	52
Belts	12
Small leather goods	11
Headwear	1
All other accessories*	24

*Includes ties, fragrances and grooming aids, hosiery, underwear, gloves, sunglasses and novelties.

Teenage Market for Accessories

In September 1980, the annual Seventeen Magazine Back-To-School Study was conducted with responses from 2,533 teenage girls concerning their purchases of apparel and accessories during this period. Questionnaires were mailed to high school and college females on Seventeen's Consumer Panels, which represent a cross section of the total teenage girl market. The results were projected to the entire teenage female market (9,176,000 girls) in terms of percent of the market purchasing specified accessories, the number of items purchased and the total expenditure for each item.

Projected to this nationwide market, the survey concluded that almost 7.8 million girls, or 84.9% of teenage girls, bought at least one of the accessories mentioned in the following table for back-to-school. Of the projected $6.8 billion spent on their back-to-school wardrobe, teenage females spent $585.2 million for accessories, 8.6% of the total.

Purchases of Accessories By Teenage Girls

	Percent Purchasing		Number Purchased (Thous. Units)	Total Expenditures (Thous. $)
	% of All Girls*	% Purchasing Any Accessory*		
Total	100.0%	100.0%	42,693	$ 585,182
Jewelry				
Earrings	33.0	38.8	8,932	78,062
Bracelets	12.2	14.4	3,096	30,377
Pins	18.0	21.3	3,686	24,266
Necklaces	23.0	27.1	4,064	95,127
Rings	15.5	18.2	2,146	123,799
Handbags	55.2	65.0	6,568	110,121
Belts	44.5	52.4	7,501	50,131
Scarfs				
Warm (outdoor)	5.0	5.9	593	5,502
Lightweight (indoor)	1.8	2.1	276	2,619
Wallets/billfolds/key cases	19.0	22.3	2,149	21,006
Sunglasses	12.5	14.7	1,234	16,434
Hats	9.6	11.3	1,115	15,530
Gloves				
Knit	8.8	10.4	1,000	6,857
Leather	3.3	3.9	333	5,351

* The numerical base for "Percent of All Girls" column is 9,176,000; for "Percent Purchasing Any Accessory" column, it is 7,789,000 girls.

Women's Handbags

A June 1979 survey conducted among a nationally-representative sample of women for the National Handbag Association analyzed their handbag purchases made in a 12-month period prior to the survey. Significant findings in the study are discussed below.

(continued)

Women's Handbags (continued)

Of the 40,186 respondents, 37% own nine or more handbags. The average number of handbags owned fell between eight and nine, with an average of close to two handbags bought in the 12 months preceding the study. Handbags made of leather accounted for 43.8% of bags purchased during this period. Vinyl handbags were the next most popular material with canvas a close third. Over half of the bags purchased were shoulder bags, with tote bags accounting for an additional 20.3% of total unit purchases.

Respondents were also asked to rank the importance of several factors in their handbag selection. Color and style were the two most frequently named factors in this decision.

Most Important Factor in Handbag Selection

	% of Mentions
Color	21.9%
Size	11.8
Style	18.2
Material	4.8
Quality	14.5
Brand name	0.7
Price	8.1
Functionalism	15.7
Type of closure	4.7
Total	100.0*

* Total adds to more than 100% due to multiple responses.

The National Handbag Association survey also broke out some demographic characteristics of women who bought handbags in the year prior to the study.

Demographic Characteristics of Handbag Purchasers

		No. of Handbags Purchased		
	Total	1	2-3	4 or more
Total respondents	100.0%	100.0%	100.0%	100.0%
Age of Respondent				
18-24 years	17.5	16.3	17.1	25.2
25-34 years	21.8	23.8	19.6	24.3
35-44 years	16.2	16.6	16.6	12.1
45-54 years	15.0	12.8	16.9	15.3
55-64 years	13.4	13.5	13.4	13.6
65 years or over	16.0	17.1	16.3	9.4

(continued)

Women's Handbags

Demographic Characteristics of Handbag Purchasers
(continued)

	Total	No. of Handbags Purchased 1	2-3	4 or more
Annual Household Income				
Under $15,000	29.1	31.5	27.5	27.0
$15,000-19,999	13.2	13.9	12.3	14.3
$20,000-24,999	12.1	9.5	15.2	7.8
$25,000-29,999	8.5	10.2	7.3	7.6
$30,000-39,999	7.1	6.5	7.0	12.0
$40,000-49,999	2.7	1.2	4.3	1.0
$50,000 and over	3.1	2.6	2.2	10.6
Don't know/no answer	24.1	24.8	24.2	19.8
Employment Status of Respondent				
Employed full-time	29.7	27.2	30.7	36.0
Employed part-time	16.7	18.7	15.4	14.5
Not employed	52.5	53.2	52.5	48.9
No answer	1.1	0.9	1.3	0.7

Source: The National Handbag Association
Consumer Study, Sept. 1979.

Jewelry and Watches

The 1980 Survey of Adults and Markets of Affluence, conducted in April and May of 1980 by Monroe Mendelsohn Research, Inc., presented the results of their study among a representative sample of U.S. adults with household incomes of $40,000 or more. Completed interviews were obtained from 3,219 affluent adults and projected to the estimated 1980 affluent population of 15.8 million, 10% of the total adult population, and the estimated 5.71 million affluent households, 7% of total U.S. households.

The study projected that jewelry was purchased in the year prior to the survey by 70.4% of all affluent adults and watches were purchased by 44.1%. Their average expenditure during this period amounted to $461 for jewelry and $242 for watches. Projected total expenditures for all affluent households was $1.85 billion for jewelry and $610 million for watches.

Other Accessories

A study conducted in April and May of 1980 by Monroe Mendelsohn Research, Inc. provided information on ownership by college students of a wide variety of products, including certain accessory items. The survey was done among a sample of college students, with 3,909 completed interviews. The results are projectionable, according to the source, to the total college population of almost 4.4 million full-time students in 1980. The age of the sample was from 18-23 years of age.

(continued)

Other Accessories (continued)

Men's belts were owned by 91.0% of the college students. Belt ownership was highest among third and fourth year students (92.5% and 92.4%, respectively). Only 88.7% of first year students owned belts. Slightly more students (91.3%) said they owned wallets or billfolds, with first year students again having the smallest percentage of owners (90.5%).

Among female students, 85.1% own belts and 88.2% own wallets or billfolds. Third year students (86.0%) and fourth year students (86.3%) were more likely to own belts than either first (84.1%) or second (84.7%) year students. In ownership of wallets or billfolds, second year students were behind only fourth year students in ownership.

Female collegians were more likely to own either an overnight bag or full-size luggage than their male counterparts (67.5%-46.8% and 68.1%-45.9%, respectively). For both types of luggage, fourth year students had the highest percentage of ownership with first year students the lowest.

The following information on men's and women's accessories has been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc., Floral Park, N.Y. They are based on the findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families. (Note that "singles" - with their own households - are not included. The data includes purchases made for men and women 17 years of age and over.)

Men's Accessories

Gloves

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Department stores	13.7	21.6
National chains	13.7	17.1
Discount stores, incl. K mart	37.2	28.5
Specialty stores	3.7	6.5
Mail order	0.6	3.3
All other outlets	30.0	22.4
Not reported	1.1	0.6

Percent of Purchases by Price Point, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $2.00	50.9	15.3
$2 - 4.99	25.6	22.8
$5 - 10.99	17.5	36.3
$11 and over	5.9	25.4

Source for both tables: NPD Research, Inc.

CONSUMER BUYING HABITS

Belts

In 1980, the average price paid for a belt by the members of the NPD panel was $7.61.

Percent of Purchase by Store Type, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Department stores	25.8	29.4
National chains	17.0	18.9
Discount stores, incl. K mart	22.7	15.4
Specialty stores	20.4	24.5
Mail order	3.6	2.7
All other outlets	9.9	8.7
Not reported	0.6	0.5

Percent of Purchases by Price Points, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $5.00	26.3	11.5
$5 - 8.99	38.7	34.9
$9 - 12.99	26.8	36.8
$13 & over	8.3	16.7

Source for both tables: NPD Research, Inc.

Headwear

According to the NPD panel data, specialty stores accounted for 29% of dollars spent for headwear, although they sold only 10% of headwear units in 1980.

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Department stores	18.2	23.1
National chains	12.2	10.5
Discount stores, incl. K mart	33.3	17.1
Specialty stores	10.0	29.0
Mail order	2.3	2.1
All other outlets	21.3	16.2
Not reported	2.7	2.0

The average price paid for a man's hat in 1980 was $9.90; for a cap, it was $3.69, according to NPD panel data.

(continued)

Men's Accessories—Headwear (continued)

Percent of Purchases by Price Points, 1980

	% of Units	% of Dollars
Total purchases of headwear	100.0%	100.0%
Less than $2.00	25.6	4.7
$2-4.99	38.7	18.1
$5-10.99	19.7	21.8
$11-24.99	11.7	27.4
$25 & over	4.5	28.1

Source for both tables: NPD Research, Inc.

Wallets

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Department stores	32.0	33.3
National chains	15.2	16.4
Discount stores, incl. K mart	21.1	19.6
Specialty stores	5.8	8.5
Mail order	1.5	1.1
All other outlets	24.4	21.0

Percent of Purchases by Price Points, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $5.00	9.4	3.0
$5-8.99	34.2	24.0
$9-14.99	33.9	38.6
$15 & over	22.5	34.4

Source for both tables: NPD Research, Inc.

CONSUMER BUYING HABITS

Women's Accessories—Gloves

The average price paid for women's gloves and mittens by the NPD panel members in 1980 was $5.41.

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Department stores	28.4	41.0
National chains	15.4	11.7
Discount stores, incl. K mart	31.4	16.5
Specialty stores	8.2	18.8
Mail order	0.2	0.4
All other outlets	15.4	10.5
Not reported	0.9	1.0

Percent of Purchases by Price Points, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $2.00	31.1	7.5
$2-4.99	36.7	22.2
$5-10.99	18.5	24.7
$11 & over	13.7	45.6

Source for both tables: NPD Research, Inc.

Handbags

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Department stores	30.3	41.3
National chains	12.5	9.8
Discount stores, incl. K mart	26.0	13.6
Specialty stores	14.2	17.7
Mail order	1.8	2.7
All other outlets	14.5	14.2
Not reported	0.7	0.7

(continued)

The average handbag sold for $12.47 in 1980, according to NPD panel diary information.

Percent of Purchases by Price Points, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $7.00	41.9	16.0
$7-14.99	32.3	26.7
$15-24.99	15.8	24.4
$25 & over	10.0	32.9

Source for both tables: NPD Research, Inc.

Belts

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Department stores	29.8	34.2
National chains	7.7	7.7
Discount stores, incl. K mart	22.2	12.0
Specialty stores	30.1	36.2
Mail order	1.3	0.6
All other outlets	6.1	6.3
Not reported	2.8	3.0

Percent of Purchases by Price Points, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $2.00	29.3	8.9
$2-4.99	39.1	31.4
$5-8.99	22.9	33.9
$9 & over	8.8	25.9

Source for both tables: NPD Research, Inc.

Hats

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Department stores	27.8	38.7
National chains	10.9	9.2
Discount stores, incl. K mart	31.1	17.3
Specialty stores	10.7	21.2
Mail order	1.4	1.5
All other outlets	17.6	11.5
Not reported	0.4	0.5

(continued)

CONSUMER BUYING HABITS

Women's Accessories — Hats (continued)

Percent of Purchases by Price Points, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $2.00	29.9	7.2
$2-4.99	39.3	25.1
$5-10.99	20.7	29.4
$11 & over	10.2	38.4

Source for both tables: NPD Research, Inc.

Wallets

Percent of Purchases by Store Type, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Department stores	34.7	42.5
National chains	22.3	21.8
Discount stores, incl. K mart	14.0	11.0
Specialty stores	6.0	5.8
All other outlets	19.8	16.8
Not reported	3.2	2.2

Percent of Purchases by Price Points, 1980

	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $5.00	31.6	10.2
$5-10.99	30.3	25.2
$11-19.99	30.6	45.2
$20 & over	7.5	19.4

Source for both tables: NPD Research, Inc.

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store types.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for *Women's Wear Daily* among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by *Footwear News Magazine*.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR (May): Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS) (May): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (August): Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS (June): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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WOMEN'S COATS, SUITS & RAINWEAR

Market Trends

Preliminary 1980 production figures from the U.S. Bureau of the Census indicate a 10.4% increase in women's, misses' and juniors' coat production compared to 1979. This increase follows an 8% decline in cuttings in 1979 compared to 1978. According to the same source, suit production fell 16.4% in 1980 from the previous year.

Imports remain a problem for the domestic coat, suit and rainwear industry. In 1980, imports of these items rose 25.9% in units to approximately 41.1 million, and their value was up 18.5%. This rise, coupled with decreased U.S. production in prior years, has allowed coat, suit and rainwear imports to approach the 50% penetration level.

The U.S. export picture continued to improve in 1980, although it is still small compared to imports. Women's and children's coats, suits, jackets and rainwear exports increased 26.7% in value and 89.5% in quantity over 1979.

U.S. coat manufacturers plan to stimulate consumer interest by offering a diversified product line for fall 1981. According to Women's Wear Daily (May 12, 1981), their new lines offer a variety of choices, such as lined raincoats, pile coats, short coats, polyester-filled coats and down-filled coats. Down coats are now viewed by manufacturers as just one category among many after being an outstanding sales performer last year. They express the hope that designer wool coats will fulfill its early promise as the new sales leader. Prior to their introduction, coats were one of the few apparel areas with little designer representation.

The continued increase in the number of working women, especially professional women, offers the best potential market for coats, suits and rainwear. A study by the Celanese Corp. estimated working women had $23.2 billion worth of apparel purchasing power in 1979.

Women's suit sales have been soft at retail. Women seem more inclined to purchase less expensive separates and blouses to stretch their apparel dollars. Good quality traditional suits which will last through several seasons are selling best.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The 1978 annual survey of manufactures compiled by the U.S. Census Bureau covers the latest available information on the women's, misses' and juniors' suit and coat industry and the waterproof outergarments industry at the manufacturer level. The ASM is based on a sample of manufacturers and is conducted in interim years between the complete census of manufactures conducted every five years. It is adjusted for comparability with the latest census report (1977).

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Value of shipments and miscellaneous receipts of manufacturers classified in the women's suit and coat industry reached $2.97 billion in 1978, a 2% increase over 1977. Value by manufacturers classified in the waterproof outergarments industry rose 7.1% in the same period to $373.7 million. (This figure includes garments for men, women and children, as well as miscellaneous receipts.)

Women's, Misses' & Juniors' Suit & Coat Industry (SIC 2337*)

	1978	1977	1972	% Change 1978/1977
Number of companies	na	1,557	1,548	--
Number of establishments, total**	na	1,672	1,618	--
Number with 20 or more employees	na	1,067	1,023	--
Employees, total (thous.)	81.4	84.7	75.9	- 3.9%
Production workers (thous.)	67.8	72.7	64.9	- 6.7
Payroll (mil. $)	$ 689.2	$ 654.0	$ 446.7	+ 5.4
Value added by manufacture# (mil. $)	1,459.2	1,429.6	839.8	+ 2.1
Value of shipments## (mil. $)	2,972.3	2,912.9	1,805.3	+ 2.0
Capital expenditures, new (mil. $)	21.9	22.0	16.4	- 0.5

Waterproof Outer Garments (SIC 2385*)

	1978	1977	1972	% Change 1978/1977
Number of companies	na	155	236	--
Number of establishments, total**	na	167	257	--
Number with 20 or more employees	na	105	164	--
Employees, total (thous.)	12.0	12.0	15.4	--
Production workers (thous.)	10.4	10.1	13.2	+ 3.0%
Payroll (mil. $)	$ 91.5	$ 89.4	$ 86.4	+ 2.3
Value added by manufacture# (mil. $)	191.9	194.4	168.8	- 1.3
Value of shipments## (mil. $)	373.7	348.8	332.1	+ 7.1
Capital expenditures, new (mil. $)	1.6	5.6	2.4	-71.4

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2337 comprises establishments primarily engaged in manufacturing women's, misses' and juniors' suits, coats, pantsuits and skirts, except fur and leather coats and raincoats. (Apparel made in knitting mills is not included.)

SIC 2385 comprises establishments primarily engaged in manufacturing raincoats from purchased rubberized fabrics and other waterproof outergarments made from such materials as pliofilm and cellophane. The industry includes manufacturers of garments for men, women and children. It does not include vulcanized rubber garments.

**Each business location is counted as a separate establishment.

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished goods inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of shipments of specified garments by all producers, including manufacturers classified in other industries, is shown on page 10.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977, 1972
Annual Survey of Manufactures, 1978.

Concentration in the Industry

In 1977, plants classified in the women's and misses' suit and coat industry with fewer than 50 employees accounted for 67.7% of all plants, but only 29.8% of total industry shipments. Plants with 100 or more employees, 12.8% of the total, shipped 48.5% of total industry output.

Manufacturing Establishments in the Women's & Misses' Suit & Coat Industry & in the Waterproof Outergarment Industry by Employment Class Size, 1977

Industry	Establishments		Employees		Value of Shipments	
	No.	% of Total	No. (Thous.)	% of Total	Mil. $	% of Total
Women's & misses' coats & suits (SIC 2337*), total	1,672	100.0%	84.7	100.0%	$2,912.9	100.0%
By Establishment size:						
Under 20 employees	605	36.2	4.7	5.5	247.8	8.5
20-49 employees	527	31.5	17.3	20.4	621.8	21.3
50-99 employees	326	19.5	22.3	26.3	631.7	21.7
100 or more employees	214	12.8	40.5	47.8	1,411.5	48.5
Waterproof outergarments (SIC 2385*), total	167	100.0%	12.0	100.0%	$ 348.8	100.0%
By Establishment size:						
Under 20 employees	62	37.1	0.5	4.2	15.8	4.5
20-99 employees	70	41.9	2.9	24.2	104.6	30.0
100-249 employees	25	15.0	4.0	33.3	104.5	30.0
250 or more employees	10	6.0	4.6	38.3	123.9	35.5

*For a definition of these SIC codes, see page 2.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Employment & Share of Shipments in Large Plants, 1980

	No. of Plants With 20+ Employees	No. of Plants With 100+ Employees	Total Shipments (Mil.$)	% of Shipments From Plants With 100+ Employees
Women's, misses' & juniors' suits & coats (SIC 2337*)	521	151	$3,683.6	62%
Waterproof outergarments (SIC 2385*)	114	46	464.4	79

*For a definition of these SIC codes, see page 2.

Source: Sales & Marketing Management,
Survey of Industrial Purchasing Power 1981,
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Employment & Earnings

Total employment in the suit and coat industry fell 3.2% to 63.1 thousand in 1980 from 65.2 thousand in 1979. The number of production workers in the industry also declined, but at a slower rate than overall employment. The average of 54.8 thousand production workers employed in 1980 was 2.5% below the 1979 level of 56.2 thousand. However, average weekly earnings of production workers increased 12.5% in 1980 to $170.00, compared to $151.06 in 1979.

Employment & Earnings in the
Women's, Misses' & Juniors' Suit & Coat Industry (SIC 2337*), 1979, 1980

	1980	1979	% Change 1980/1979
All employees (thous.)	63.1	65.2	- 3.2%
Production workers (thous.)	54.8	56.2	- 2.5
Average weekly earnings	$170.00	$151.06	+12.5
Average hourly earnings	5.00	4.55	+ 9.9
Average weekly hours	34.0	33.2	+ 2.4

*For a definition of this SIC code, see page 2.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, March 1980, 1981.

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Selected Business Ratios in the Suit & Coat Industry & in the Waterproof Outergarment Industry, 1979
(Median Results)

	Women's, Misses' & Juniors' Suits & Coats (SIC 2337*)	Waterproof Outergarments (SIC 2385*)
Number of firms reporting	232	28
Current assets to current debt (times)	1.72	2.01
Net profits on net sales (percent)	2.22	0.71
Net sales to inventory (times)	7.9	8.5
Net sales to net working capital (times)	8.52	5.33
Average collection period (days)	40	50

*For a definition of these SIC codes, see page 2.

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
(All rights reserved.)

Location

New York State had the biggest concentration of the women's coat and suit industry, accounting for 38.7% of the plants and 34.7% of industry shipments in 1977. California, which has become increasingly important in the women's wear industry in recent years, accounted for 11.5% of shipments with 13% of the plants.

A third of the shipments of the waterproof outergarment industry came out of Maryland in 1977 and that state had only 6.6% of the plants.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location

Leading States in the Women's Suit & Coat Industry & in the Waterproof Outergarment Industry, 1977

	Establishments (plants)		Employees (thous.)	Value of Shipments (Mil.$)
	No.	With 20+ Employees		
Women's, misses' & juniors' suits & coats (SIC 2337*), total	1,672	1,067	84.7	$2,912.9
New England Division:				
Massachusetts	99	71	6.3	312.9
Connecticut	33	25	2.2	95.3
Middle Atlantic Division:				
New York	648	349	20.8	1,001.4
New Jersey	260	199	12.4	261.2
Pennsylvania	72	60	5.3	163.3
East North Central Division:				
Ohio	10	9	(D)	(D)
Illinois	30	21	1.9	40.4
West North Central Division:				
Minnesota	13	9	0.8	31.8
Missouri	21	16	2.2	70.2
South Atlantic Division:				
Maryland	11	6	1.0	11.6
North Carolina	19	14	1.9	28.2
South Carolina	18	15	1.6	95.5
Georgia	15	12	1.1	21.1
Florida	47	26	2.5	46.3
East South Central Division:				
Tennessee	16	12	2.2	65.4
Alabama	11	11	1.8	21.4
West South Central Division:				
Texas	55	37	4.2	141.7
Pacific Division:				
Washington	12	7	0.5	9.5
California	218	119	8.6	336.1
Waterproof outergarments (SIC 2385*), total	167	105	12.0	$ 348.8
New England Division:				
Massachusetts	14	10	0.8	13.7
Middle Atlantic Division:				
New York	62	37	1.9	80.5
New Jersey	18	14	1.0	20.1
Pennsylvania	5	3	0.2	2.5
South Atlantic Division:				
Maryland	11	10	3.3	116.3
Georgia	10	8	0.9	22.3
East South Central Division:				
Alabama	3	3	0.5	7.0
Pacific Division:				
California	5	2	(D)	(D)

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

Location

(D) = Withheld by the Census Bureau to avoid disclosing operations of individual firms.
*For a definition of these SIC codes, see page 2.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCTION

Reports on a monthly industry survey conducted by the Census Bureau covering a sample of manufacturers indicate that production of women's coats totaled 19,199,000 units in 1980, which was 10.4% above the 1979 total. Cuttings of suits totaled 21,140,000 in 1980, according to preliminary data, which was 16.4% below the 1979 total.

The seasonal pattern in cuttings, based on the monthly Census Bureau reports, was as follows:

Cuttings of Women's, Misses' & Juniors' Suits & Coats by Months, 1979, 1980

Suits (incl. pantsuits)	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1980(p)	100.0%	8.4%	9.7%	10.4%	8.6%	6.6%	7.0%	7.2%	9.3%	11.2%	9.2%	6.6%	5.8%
1979	100.0	8.5	9.6	10.5	8.6	8.8	8.7	7.3	8.8	8.1	8.7	6.8	5.6
Coats													
1980(p)	100.0	5.9	6.9	6.8	7.5	8.9	9.4	8.5	11.5	10.2	10.0	8.3	6.1
1979	100.0	6.3	5.7	7.0	7.9	9.1	9.6	8.7	12.0	9.8	9.9	8.7	5.1

(p) = preliminary

Source: Based on U.S. Bureau of the Census
Current Industrial Reports (monthly)
M23H(81) Women's, Misses' & Juniors' Apparel.

The annual Current Industrial Report summary for 1979 showed production of coats for women down 8.0% compared with 1978, while output of suits dropped 21.2%. The annual reports in this series include information on cuttings by price line and by fabric construction, as noted in the following table.

(continued)

PRODUCTION

By Fabric/Price

Production of Women's, Misses' & Juniors' Suits & Coats
By Wholesale (Factory) Price, Fabric & Construction, 1977-1979
(Thousands of Units)

	Production			% Change
	1979	1978	1977	1979/1978
Women's, misses' & juniors' suits	25,275	32,089	36,487	-21.2%
Pantsuits	15,872	20,614	23,570	-23.0
By construction:				
Woven fabric	7,318	8,881	na	-17.6
Knit fabric	5,705	8,468	na	-32.6
Construction, n.s.k.	2,849	3,265	na	-12.7
By fabric:				
All cotton & chiefly cotton	567	1,578	na	-64.1
All man-made & chiefly man-made	12,223	15,675	na	-22.0
All wool & chiefly wool	448	451	na	- 0.7
All other fabric	2,634	40	na	- 9.5
Fabric, n.s.k.		2,870	na	
Suits, except pantsuits	9,403	11,475	12,917	-18.1
By price (per unit):				
Under $16.00	769	956	1,304	-19.6
$16.00 to $38.99	6,075	7,695	7,695	-21.0
$39.00 & over	2,060	2,693	2,298	-23.5
Price line, n.s.k.	499	131	1,620	+280.9
By construction:				
Woven fabric	2,177	3,419	3,478	-36.3
Knit fabric	6,798	7,813	7,902	-13.0
Construction, n.s.k.	428	243	1,537	+76.1
By fabric:				
All cotton & chiefly cotton	386	667	477	-42.1
All man-made & chiefly man-made	7,999	9,486	9,805	-15.7
All wool & chiefly wool	950	1,119	496	-15.1
All other fabric	68	76	--	-66.5
Fabric, n.s.k.		127	2,139	
Women's, misses' & juniors' coats, except fur, all leather & rain	17,394	18,911	18,956	- 8.0
By price (per unit):				
Under $16.00	306	634	1,845	-51.7
$16.00 to $38.99	8,287	9,293	10,480	-10.8
$39.00 to $75.99	5,469	5,905	4,259	- 7.4
$76.00 & over	1,649	1,531	884	+ 7.7
Price line, n.s.k.	1,683	1,548	1,488	+ 8.7
By construction:				
Woven fabric	15,791	16,494	16,294	- 4.3
Knit fabric	949	1,409	1,773	-32.6
By fabric:				
All cotton & chiefly cotton	461	411	253	+12.2
All man-made & chiefly man-made	7,697	8,880	10,327	-13.3
All wool & chiefly wool	7,872	8,369	6,166	- 5.9

(continued)

By Fabric/Price

Production of Women's, Misses' & Juniors' Suits & Coats By Wholesale (Factory) Price, Fabric & Construction, 1977-1979
(Thousands of Units)
(continued)

	Production			% Change
	1979	1978	1977	1979/1978
Women's, misses' & juniors' coats, except fur, all leather & rain (continued)				
By fabric (cont'd):				
All other fabric	107	186	--	-42.5%
Fabric, n.s.k.	1,234	1,065	2,210	+15.9

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census, Current Industrial Reports, MA-23A-(79)-1 Apparel.

Production of Women's, Misses' & Juniors' Raincoats by Fabric, 1977-1979
(Thousands of Units)

	Production			% Change
	1979	1978	1977	1979/1978
Women's, misses' & juniors' raincoats, total	5,497	5,750	6,363	- 4.4%
Plastic (with & without fabric trim)	4	3	na	+33.3
Rubberized and/or coated fabric	81	177	na	-54.2
Uncoated fabric:				
All cotton & chiefly cotton	671	645	na	+ 4.0
All man-made & chiefly man-made	4,170	4,400	na	- 5.2
All other fabric	442	383	na	+15.4
Construction, n.s.k.	129	142	na	- 9.1

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census, Current Industrial Reports, MA-23A-(79)-1 Apparel.

PRODUCTION

Additional information on women's suit, coat and rainwear production is available from the National Cotton Council's Cotton Counts Its Customers. This source covers some items not included in the Census Bureau reports.

Production of Women's, Misses' & Juniors' Suits, Coats & Rainwear, 1977-1979
(Thousands of Units)

	Production		
	1979(p)	1978(r)	1977(r)
Women's, misses' & juniors':			
Coats & jackets, excl. leather	38,448	38,652	39,876
Coats	18,816	19,404	18,960
Knit, incl. fake fur	1,224	1,356	1,860
Woven	17,592	18,048	17,100
Jackets	19,632	19,248	20,916
Knit, incl. fake fur	9,024	9,204	10,248
Woven	10,608	10,044	10,668
Suits & pantsuits	33,408	32,844	36,492
Dress suits, incl. uniform	12,048	11,700	12,924
Knit	8,556	8,304	8,964
Woven	3,492	3,396	3,960
Pantsuits & jumpsuits	21,360	21,144	23,568
Knit	10,464	10,356	11,316
Woven	10,896	10,788	12,252
Rainwear, excl. plastic & rubberized	5,748	5,640	6,168
Knit	684	732	684
Woven	5,064	4,908	5,484

(p) = preliminary
(r) = revised

Source: National Cotton Council of America, Cotton Counts Its Customers, 1980 Edition.

PRODUCTION

Materials Consumed in Production

Materials Consumed in the Women's Suit & Coat Industry & in the Waterproof Outergarment Industry, 1977

	Delivered Cost (Mil. $)
Women's & misses' suit & coat industry (SIC 2337*), total	$ 939.5
Broadwoven fabrics	412.7
Purchased knitted fabrics	182.5
All other materials, containers & supplies, including n.s.k.	344.3
Waterproof outergarment industry (SIC 2385*), total	105.2
Broadwoven fabrics	51.6
Purchased knitted fabrics	3.3
All other materials, containers & supplies, including n.s.k.	50.3

n.s.k. = not specified by kind
*For a definition of these SIC codes, see page 2.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

SHIPMENTS

A preliminary estimate for the year 1980 on the value of shipments of women's suits and coats by all U.S. producers, issued by the Bureau of Industrial Economics, U.S. Census Bureau (U.S. Industrial Outlook 1981), indicated an increase of over 8% compared with the 1979 total, and a gain of 16.5% compared with 1978.

Industry estimates based on a sample survey covering shipments in 1979, issued by the Census Bureau in the Current Industrial Reports (which are not directly comparable to the broader-based 1977 census of manufactures or annual survey of manufactures data) are reported below. Coats and raincoats have fared better than suits.

Trends in Value of Shipments of Women's Coats, Suits & Raincoats, 1979/1978

	1979 (Mil.$)	% Change 1979/1978
Women's, misses, juniors'		
Coats, excluding fur, all-leather	$694.8	+ 4.5%
Suits, excluding pantsuits	256.5	-22.1
Pantsuits	238.6	-26.7
Raincoats	173.3	+ 8.2

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel, MA-23A (79)-1.

SHIPMENTS

The most comprehensive figures on shipments are covered in the complete census of manufactures, compiled by the Census Bureau at five-year intervals, in years ending in "2" and "7." In interim years, the Census Bureau issues reports in an annual survey of manufactures which is based on a sample of manufacturing firms. The data obtained from the sample are adjusted by the Census Bureau for comparability with the complete census, and available findings for 1978 and 1977 are covered in the following table, as well as for 1972.

Value of Shipments of Women's Suits & Coats by All Producers, 1972, 1977, 1978

	Quantity (thous.)		Value (Mil.$)			% Change
	1977	1972	1978	1977	1972	1978/1977
Women's, misses' & juniors' coats & capes (except all-fur, leather)	19,040	23,508	$634.7	$612.1	$570.1	+ 3.7%
Suits:	36,527	22,871	nr	762.4	409.9	--
Made in cut-&-sew shops	36,315	17,207	555.9	665.3	313.2	-16.4
Made in knitting mills	212	5,664	nr	97.0	96.7	--
Coats & suits, type not specified	nr	nr	226.1	285.9	115.9	-20.9
Contract work on women's, misses' & juniors' suits, coats & skirts	--	--	425.7	423.9	282.7	+ 0.4

nr - not reported

Source: U.S. Bureau of the Census, Census of Manufactures, 1972, 1977; Annual Survey of Manufactures, 1978.

By Leading State

Based on the total value of shipments of women's coats and suits by all manufacturers, by state, reported in the complete census of manufactures, New York State, while maintaining its leadership has been losing ground. In the coat industry, New Jersey registered the sharpest gain in value of shipments from 1972 to 1977; Pennsylvania in the case of women's suits.

(continued)

SHIPMENTS

By Leading State

Value of Shipments of Women's Coats & Suits by All Producers By Leading States, 1977, 1972

	Value of Shipments (Mil. $) 1977	Value of Shipments (Mil. $) 1972	% Change 1977/1972
Women's, misses' & juniors' coats & capes			
United States, total	$ 612.1	$ 570.1	+ 7.4%
New England Division:			
Connecticut	11.0	nr	--
Middle Atlantic Division:			
New York	333.4	355.1	- 6.1
New Jersey	60.1	18.0	+233.9
Pennsylvania	6.9	4.6	+50.0
East North Central Division:			
Illinois	17.4	nr	--
West North Central Division:			
Minnesota	18.8	nr	--
Missouri	38.8	28.2	+37.6
Pacific Division:			
Washington	2.4	nr	--
California	61.2	50.4	+21.4
Women's, misses' & juniors' suits			
United States, total	665.3	313.2	+112.4
New England Division:			
Massachusetts	15.9	12.9	+23.3
Middle Atlantic Division:			
New York	208.6	130.8	+59.5
New Jersey	12.4	15.5	-20.0
Pennsylvania	43.4	1.6	+2,612.5
East North Central Division:			
Illinois	6.2	7.9	-21.5
West North Central Division:			
Missouri	11.3	6.2	+82.3
South Atlantic Division:			
North Carolina	7.5	nr	--
Florida	29.2	7.0	+317.1
West South Central Division:			
Texas	80.4	nr	--
Pacific Division:			
California	100.0	52.1	+91.9
Contract work on women's, misses' & juniors' suits, coats & skirts			
United States, total	423.9	282.7	+49.9
New England Division:			
Massachusetts	45.5	18.7	+143.3
Connecticut	6.7	6.9	- 2.9

(continued)

SHIPMENTS

By Leading State

Value of Shipments of Women's Coats & Suits by All Producers By Leading States, 1977, 1972 (continued)

	Value of Shipments (Mil. $)		% Change
	1977	1972	1977/1972
Contract work on women's, misses' & juniors' suits, coats & skirts (continued)			
Middle Atlantic Division:			
New York	$ 88.1	$ 95.3	- 7.5%
New Jersey	85.9	63.0	+36.3
Pennsylvania	29.5	17.7	+66.7
East North Central Division:			
Illinois	13.4	5.2	+157.7
West North Central Division:			
Missouri	3.4	2.2	+54.5
South Atlantic Division:			
Maryland	8.6	nr	--
Virginia	5.7	nr	--
North Carolina	7.8	nr	--
South Carolina	6.8	5.8	+17.2
Georgia	4.8	2.4	+100.0
Florida	12.1	8.2	+47.6
East South Central Division:			
Tennessee	9.1	1.4	+550.0
West South Central Division:			
Arkansas	9.4	nr	--
Texas	11.9	nr	--
Pacific Division:			
Washington	6.1	nr	--
California	33.2	20.1	+65.2

nr = not reported.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-I-23B.

PRODUCER PRICES

Producer (Factory) Price Indexes for Specified Women's Apparel Categories, 1979, 1980
(1967 = 100 unless otherwise indicated)

	Annual Averages		% Change
	1980	1979	1980/1979
All apparel	172.2	160.4	+ 7.4%
Women's apparel	150.3	140.3	+ 7.1
Pantsuits, incl. jumpsuits (12/77=100)	na	107.5	na
Untrimmed coats & capes	135.9	138.0	- 1.5

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports

The import value of women's and children's coats and raincoats reached $438.3 million in 1980, 18.5% above the 1979 value. The quantity imported rose 25.9% to 3.4 million dozen. Coats of man-made fibers, the largest import classification in the coat and raincoat category, increased 30.7% in value and 28.1% in import quantity in 1980 compared to 1979. Cotton coats, other than those coats 3/4 length or longer, imported into the U.S. showed the largest rise in both value and quantity of any of the reported coat categories, 86.7% and 79.3%, respectively.

Far Eastern countries dominated the list of leading countries of origin for imported coats and raincoats, with one exception. Uruguay was the biggest exporter of wool coats (not knit) to the U.S. and accounted for 26.1% of the import value of these coats and 29.9% of the quantity.

FOREIGN TRADE

Imports

Imports of Women's, Girls' & Infants' Coats & Raincoats By Leading Country of Origin, 1979, 1980

	Quantity (Thous. Doz.)			Value CIF* (Thous. $)		
	1980	1979	% Change 1980/1979	1980	1979	% Change 1980/1979
Women's, girls' & infants' coats & raincoats, total	3,425.6	2,720.3	+ 25.9%	$438,278	$369,928	+ 18.5%
Coats, wool, not knit	151.6	134.6	+ 12.6	41,720	41,490	+ 0.5
Uruguay	45.4	51.2		10,905	13,762	
Japan	33.9	19.2		6,808	4,026	
Hong Kong	17.9	20.6		4,359	4,555	
Coats, cotton, 3/4 length or longer, not knit	237.3	364.7	- 34.9	46,655	76,107	- 38.7
Hong Kong	69.1	97.8		14,602	21,874	
Taiwan	26.4	38.4		6,398	9,205	
Korea	22.6	37.2		4,314	8,336	
Cotton, n.s.p.f., not knit	1,096.3	611.3	+ 79.3	144,429	77,367	+ 86.7
Hong Kong	212.9	118.2		32,982	18,627	
Japan	173.0	124.6		32,041	19,642	
People's Republic of China	172.5	51.5		17,683	4,248	
Man-made fibers, n.s.p.f., not knit	1,755.1	1,369.9	+ 28.1	167,243	127,991	+ 30.7
Korea	525.9	298.7		57,512	34,031	
Taiwan	439.6	287.1		43,515	29,124	
Hong Kong	269.2	266.3		30,151	29,305	
Wool, knit	38.0	24.9	+ 52.6	12,346	9,647	+ 28.0
Hong Kong	26.6	12.1		5,842	2,382	
Federal Republic of Germany	3.1	6.6		1,895	3,718	

*The CIF value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price, including all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

n.s.p.f. = not specially provided for

Source: U.S. Bureau of the Census,
U.S. General Imports,
FT 135 December 1979, 1980.

FOREIGN TRADE

Exports

While still a small part of overall production, U.S. exports of women's, girls' and infants' coats, suits and raincoats are growing rapidly. In 1980, exports of these items were valued at $26.0 million, a 26.7% increase from 1979. The quantity of exports jumped 89.5% during the same period.

Women's coats, suits and raincoats exported to other countries, primarily in Central America, rose 56.0% in value and 90.4% in units compared with 1979. Women's, girls' and infants' suits gained 39.7% in export quantity but fell 14.7% in value, with Central American countries the primary market for these goods. Much of the loss in export value was accounted for by the 41.3% drop in the value of suits made of man-made fibers. This loss occurred despite a 52.9% increase in the export quantity of these suits.

Exports of Women's, Girls' & Infants' Coats, Suits & Rainwear, 1979, 1980

	Quantity (Thous. Doz.)			Value* (Thous. $)		
	1980	1979	% Change 1980/1979	1980	1979	% Change 1980/1979
Women's, girls' & infants' coats, suits & raincoats, total	423.1	223.3	+ 89.5%	$26,019	$20,538	+ 26.7%
Women's coats, jackets & raincoats, total	194.9	102.4	+ 90.4	15,259	9,780	+ 56.0
Not knit						
Wool	32.9	10.1	+225.7	2,955	973	+203.7
Cotton	11.7	7.4	+ 58.1	1,151	565	+103.7
Man-made fibers	64.5	47.7	+ 35.2	6,697	5,411	+ 23.8
Knit						
Wool	2.1	1.8	+ 16.7	217	220	- 1.4
Cotton	14.0	9.3	+ 50.5	1,019	645	+ 58.0
Man-made fibers	23.7	13.5	+ 75.6	2,156	1,161	+ 85.7
All other textile materials	46.0	12.5	+268.0	1,064	805	+ 32.2
Women's, girls' & infants' coats, jackets & raincoats, not knit, of textile materials not mentioned above	79.3	14.3	+454.5	3,694	2,475	+ 49.2
Women's, girls' & infants' suits, total	148.9	106.6	+ 39.7	7,066	8,283	- 14.7
Not knit						
Wool	2.3	1.8	+ 27.8	116	104	+ 11.5
Cotton	9.2	9.1	+ 1.1	817	611	+ 33.7
Man-made fibers	97.4	63.7	+ 52.9	3,295	5,616	- 41.3
All other textile materials	1.4	0.7	+100.0	174	217	- 19.8
Knit						
Wool	7.0	1.8	+288.9	252	85	+196.5
Cotton	6.1	14.6	- 58.2	330	666	- 50.4
Man-made fibers	23.2	12.8	+ 81.2	1,819	792	+129.7
All other textile materials	2.1	2.1	--	263	192	+ 37.0

(footnotes continued)

Exports (continued)

Exports of Women's, Girls' & Infants' Coats, Suits & Rainwear, 1979, 1980
(continued)

*This value represents the value at the U.S. port of export, based on the transaction price including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance and any other charges or transportation cost beyond the port of operation.

Source: U.S. Department of Commerce,
FT 410, U.S. General Exports,
December 1979, 1980.

WOMEN'S SUITS, COATS & RAINWEAR
AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Female Population of the U.S., 1980 & Projections to 2000*
(In Thousands)

	1980	1985	2000	% Change 2000/1980	Percent of Female Population		
					1980	1985	2000
Total, all ages	116,472	119,514	133,790	+ 14.9%	100.0%	100.0%	100.0%
Under 15 years	25,069	25,203	27,785	+ 10.8	21.5	21.1	20.8
15 years & older	91,403	94,311	106,005	+ 16.0	78.5	78.9	79.2
15-19 years	10,410	8,857	9,658	- 7.2	8.9	7.4	7.2
20-24 years	10,652	10,192	8,360	- 21.5	9.1	8.5	6.2
25-34 years	18,698	20,034	17,326	- 7.3	16.1	16.8	12.9
35-44 years	13,063	16,002	21,084	+ 61.4	11.2	13.4	15.8
45-54 years	11,789	11,542	18,356	+ 55.7	10.1	9.7	13.7
55-64 years	11,549	11,390	12,116	+ 4.9	9.9	9.5	9.1
65 years & older	15,242	16,293	19,103	+ 25.3	13.1	13.6	14.3
Median age (in years)	31.3	32.7	36.8				

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
1980 Census of Population
Supplementary Reports
PC80-S1-1;
Current Population Reports,
Series P-25, No. 714 (July 1977).

(continued)

THE POTENTIAL MARKET

According to the Census Bureau, the number of women in the U.S. aged 15 and over will grow 16.0% by the year 2000. Women aged 35-44 will increase 61.4% by 2000 to more than 21 million, or 19.9% of females 15 and older. The next largest increase is in the 45-54 year old age group, which is expected to rise 55.7% to 18.3 million women. During the same time span, women aged 15-34 are expected to decline in numbers, with the biggest decrease (-21.5%) in the 20-24 year old age bracket.

Working Women

The number of working women in the U.S. expanded throughout the 70's. Nearly 12 million more women were in the labor force in 1979 than in 1970. These women accounted for about 60% of the total gain in the labor force during the decade. Women aged 25 to 34 were responsible for almost half of the increase in the number of female workers in that ten-year period.

By 1980, there were a total of 44.6 million working women in the U.S., approximately 52% of the female population aged 16 and over. The labor force participation rates (those women who are working or looking for a job), for selected age groups, can be found in the following table.

Labor Force Participation Rates of Women By Age, 1979, 1980
(Annual Averages)

	1980	1979
Total, 16 years and over	51.6%	51.0%
By Age Group:		
16 & 17 years	43.8	45.8
18 & 19 years	53.1	62.9
20-24 years	69.0	69.1
25-34 years	65.4	63.8
35-44 years	65.5	63.6
45-54 years	59.9	58.4
55-64 years	41.5	41.9
65 years & older	8.1	8.3

Source: U.S. Bureau of Labor Statistics.

A study on working women released by the Celanese Fibers Marketing Company in January 1980 placed the apparel purchasing power of working women at $23.2 billion, or approximately $525 per woman. Professional women, 23% of all working women according to the Celanese survey, held $8.6 billion of this purchasing power.

This large market for women's wear—and especially such items as dresses, coats, suits, and blazers—has prompted many department and specialty stores to open departments specially designed to appeal to the working woman and her need for quick efficient shopping, personalized service and wardrobe advice. According to a survey of these shops by Women's Wear Daily (December 3, 1980), they have shown steady increases in sales since their inception.

For a more detailed look at working women, see the Fairchild Fact Files: Consumer Market Developments and Market Pacesetters (Young Adults).

CONSUMER PRICES

Consumer Price Indexes for Specified Women's Apparel Categories, 1979, 1980
(1977 = 100)

	Annual Averages		% Change
	1980	1979	1980/1979
Women's apparel	103.1	101.3	+ 1.8%
Coats & jackets	164.2	167.2	- 1.8
Suits	90.9	92.3	- 1.5

Source: U.S. Bureau of Labor Statistics.

RETAIL SALES BY STORE TYPE

The only official information available on sales of women's coats and suits in specified types of retail outlets is contained in the 1977 Census of Retail Trade. Only stores with payrolls are included in the merchandise line reports and not all store types were required to break down their sales by merchandise category. Due to a change in the classification system, comparative figures for earlier census years are not available.

Dressy & Tailored Coats & Suits

Women's ready-to-wear stores accounted for almost half of reported sales of women's dressy and tailored coats and suits in 1977. Department store sales of $550.2 million represented 34.1% of the total which, as defined by the Census Bureau, excludes pantsuits and rainwear.

Reported Sales of Women's Coats & Suits by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's coats & suits	33,099	100.0%	$1,615.7	100.0%
Department stores**	5,787	17.5	550.2	34.1
Women's ready-to-wear stores***	17,334	52.4	800.1	49.5
Family clothing stores	5,702	17.2	156.2	9.7
All other outlets (men's wear stores, children's wear stores & mail order houses)	4,276	12.9	265.4	16.4

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

***Does not include sales in women's accessory and specialty stores (including furriers). Sales of women's and girls' wear in these stores totaled $858.9 million in 4,962 stores with payrolls.

Source: Based on U.S. Bureau of the Census
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Casual Coats, Jackets & Rainwear

In 1977, sales of casual coats, jackets and rainwear were reported at $1.56 billion in the leading store types. Women's ready-to-wear stores reported sales of $681.1 million, 43.5% of the total.

Reported Sales of Women's Casual Coats, Jackets & Rainwear By Store Type, 1977

(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's casual coats, jackets & rainwear	39,449	100.0%	$1,565.9	100.0%
Department stores**	6,940	17.6	608.8	38.9
Women's ready-to-wear stores***	18,640	47.2	681.1	43.5
Family clothing stores	9,256	23.5	201.9	12.9
All other outlets (men's wear stores, children's wear stores & mail order houses)	4,613	11.7	74.1	4.7

(See footnotes on previous table)

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

Percent of Total Women's & Children's Wear Sales Accounted for by Women's Coats & Suits in Key Store Types Reporting Sales, 1977

	Total Women's & Children's Wear Sales* (Mil. $)	% of Sales Accounted For By:	
		Dressy & Tailored Coats & Suits	Casual Coats, Jackets & Rainwear
Department stores	$16,250.7	3.4%	3.7%
Women's ready-to-wear stores**	11,066.5	7.2	6.1
Family clothing stores	3,471.6	4.5	5.8

*Excludes footwear sales.
**Excludes sales in women's accessory and specialty stores.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Department Stores

In 1977, there were 79 firms with annual department store sales of $100 million or more operating 7,311 establishments with combined sales of $70.6 billion, 91.9% of total department store sales.

Sales Concentration in Department Stores, 1977

	Firms		Stores		Sales	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Department stores	600	100.0%	8,807	100.0%	$76,909.4	100.0%
$100 million or over	79	13.2	7,311	83.0	70,605.2	91.9
$ 50 mil. - 99.9 mil.	32	5.3	453	5.1	2,268.4	2.9
$ 5 mil. - 49.9 mil.	201	33.5	729	8.3	3,340.3	4.3
$ 1 mil. - 4.9 mil.	253	42.2	279	3.2	667.2	0.9
Under $1 million	35	5.8	35	0.4	28.3	*

* Less than 0.05%

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Establishment & Firm Size RC77-S-1.

Total Department Store Sales, 1978-1980
(Millions of Dollars)

	1980(r)	1979(r)	1978(r)	% Change	
				1980/ 1979	1980/ 1978
Total sales	$94,185	$88,520	$81,494	+ 6.4%	+15.6%

(r) = revised.

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales BR-13-80S.

Percent of Department Store Sales of Women's & Misses' Coats & Suits, by Months

	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Coats	100.0%	10.4%	7.1%	10.1%	8.2%	4.0%	2.3%	3.2%	7.3%	8.8%	12.2%	13.2%	13.2%
Suits	100.0	6.7	8.5	13.7	12.1	7.0	4.5	4.7	7.0	10.3	10.1	7.0	8.4

Source: Newspaper Advertising Bureau, based on
Federal Reserve Board data,
(1961-1965) latest available.

Operating Ratios

Median sales of women's, misses' and juniors' suits in department stores with total sales over $1 million improved 18.3% in 1979 compared to 1978, according to a survey by the National Retail Merchants Association. Over the same period, sales of all female apparel increased a typical 7.0%. Women's, misses' and juniors' jackets, casual and all-weather coats also did better, rising 10.3%, typically, over 1978. Dressy and tailored coat sales were up only 2.5% in 1979.

Merchandising & Operating Results in Women's Coat & Suit Departments, 1979
(Median Results for Department Stores With Sales Over $1 Million)

		Women's, Misses' & Juniors'		
	Adult Female Apparel (147*)	Dressy & Tailored Coats (101*)	Jackets, Casual & All-Weather Coats (64*)	Suits (41*)
Net sales, % change from last year	+ 7.0%	+ 2.5%	+ 10.3%	+ 18.3%
Net sales, % of merchandise division	100.0	3.5	1.9	0.5
Net sales, % of total store sales	36.7	1.3	0.7	0.2
$ sales per square foot of selling space (main or largest unit)	$107.4	$114.0	$134.0	$ 64.0
Cumulative markon, %	50.2%	49.8%	49.5%	49.9%
Gross margin, % of net sales (including cash discounts)	43.6	43.7	46.4	39.9
Markdowns, retail, % of net sales	18.2	18.7	13.7	24.9
Number of stock turns (times)	4.0	3.3	3.9	3.3
Salespeople's salaries, % of sales (main or largest selling unit)	7.2	7.1	7.1	6.8
Sales promotion, % of net sales	3.1	3.1	3.7	3.4

*Number represents the number of reporting stores in each category.

Source: National Retail Merchants Association, "Merchandising & Operating Results of 1979," 1980 Edition.

Women's Ready-To-Wear Stores

Large firms, with annual sales of $1 million and over, operated 27.3% of all women's ready-to-wear stores in 1977. These outlets had combined sales of $8.0 billion, or 64.6% of total sales in all stores of this type. Firms with annual sales under $500,000 represented 91.9% of the total number of firms but had only 26.7% of total sales.

(continued)

Women's Ready-To-Wear Stores (continued)

Sales Concentration in Women's Ready-To-Wear Stores, 1977

	Firms		Stores		Sales	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Women's ready-to-wear stores	31,612	100.0%	44,894	100.0%	$12,442.6	100.0%
$10 million or more	111	0.3	7,442	16.6	5,223.5	42.0
$ 1 mil. - 9.9 mil.	1,167	3.7	4,816	10.7	2,817.2	22.6
$500,000 - 999,999	1,540	4.9	2,606	5.8	1,078.7	8.7
Under $500,000	28,794	91.1	30,030	66.9	3,324.2	26.7

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Establishment & Firm Size RC77-S-1.

Women's Ready-To-Wear Store Sales, 1978-1980
(Millions of Dollars)

	1980(r)	1979(r)	1978(r)	% Change 1980/1979	% Change 1980/1978
Total sales	$15,646	$14,969	$14,297	+ 4.5%	+ 9.4%

(r) = revised.

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales
BR-13-80-S.

Operating Ratios

Women's, misses' and juniors' suit sales jumped a typical 32.1% in 1979 over 1978 suit sales in specialty stores with sales over $1 million. This was far above the median 6.9% sales increase for all female apparel in specialty stores reported by the National Retail Merchants Association. The two other coat classifications reported by this source—dressy & tailored coats and jackets, casual & all-weather coats—had sales increases lower than the median for all female apparel.

(continued)

RETAIL SALES BY STORE TYPE

Operating Ratios

Merchandising & Operating Results in Women's Coat & Suit Departments, 1979
(Median Results for Specialty Stores With Sales Over $1 Million)

	Adult Female Apparel (51*)	Women's, Misses' & Juniors' Dressy & Tailored Coats (26*)	Women's, Misses' & Juniors' Jackets, Casual & All-Weather Coats (12*)	Women's, Misses' & Juniors' Suits (12*)
Net sales, % change from last year	+ 6.9%	+ 3.3%	+ 6.3%	+ 32.1%
Net sales, % of merchandise division	100.0	5.3	3.2	1.6
Net sales, % of total store sales	64.2	3.6	1.8	1.1
$ sales per square foot of selling space (main or largest unit)	$145.1	$154.0	na	na
Cumulative markon, %	50.9%	49.5%	49.6%	50.8%
Gross margin, % of net sales (including cash discounts)	42.2	45.1	45.9	42.1
Markdowns, retail, % of net sales	21.9	20.0	12.1	22.8
Number of stock turns (times)	3.9	3.8	4.0	4.5
Salespeople's salaries, % of sales (main or largest selling unit)	7.1	na	na	na
Sales promotion, % of net sales	2.3	na	na	na

*Number represents the number of reporting stores in each category.
na = not available

Source: National Retail Merchants Association, "Merchandising & Operating Results of 1979," 1980 Edition.

RETAIL ADVERTISING

Seasonality in Retailers' Newspapers Advertising Linage On Women's & Misses' Coats & Jackets, 1978, 1979

Coats & Jackets	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1979	7.1%	7.6%	6.9%	4.0%	2.8%	3.1%	4.3%	8.9%	11.4%	14.4%	17.5%	12.0%
1978	8.0	8.1	8.3	4.4	3.0	3.0	5.7	8.7	8.5	13.4	16.2	12.7

Source: Advertising Checking Bureau, George Neustadt, Inc., covering retail newspaper linage in seven cities.

Working Women

A study released in January 1980 by the Celanese Fibers Marketing Company classified working women into eight subgroups according to job profile. Two types of professional women were profiled. One group, known as the formal professional, consists of accountants, lawyers, sales managers, executives and administrators. The second group, the informal professional, is composed of teachers, artists, engineers, advertising and medical personnel, computer science technicians and other similar occupations.

In addition to identifying these groups, the study sought to gain information on their apparel purchasing attitudes via focus groups held among a cross section of women across the U.S. Among their findings, the study reported that the formal professional purchases apparel for occupational status, conformity to a dress code and for physical attractiveness. They prefer classic clothes, with a touch of contemporary styling, of good quality. Better department and specialty stores are their most frequent shopping outlets.

The informal professional woman buys clothes for their practicality as functional work apparel, as well as for occupational status and the physical attractiveness of the garments. While these women also shop in better department stores, moderate to better specialty stores and national chains are two other popular store types for their apparel purchases. The clothing they buy must be attractive but functional. Informal professional women tend to buy a variety of styles, according to the study, with quality an important criterion.

The following information on women's coats, suits and rainwear has been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc., Floral Park, N.Y. They are based on the findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families. (Note that "singles"—with their own households—are not included. The data includes purchases for women aged 17 and older.)

Women's Suits

Percent of Purchases by Store Type, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Department stores	26.3	26.9
National chains	10.6	6.5
Discount stores, including K mart	10.8	7.1
Specialty stores	41.0	60.0
All other stores/no answer	11.2	8.4

(continued)

CONSUMER BUYING HABITS

Women's Suits

Percent of Purchases by Price Points, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Less than $20	25.6	7.2
$20 - 39.99	30.7	18.3
$40 - 69.99	23.4	26.4
$70 - 99.99	10.6	18.5
$100 & over	9.6	29.6

Percent of Purchases by Month, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	7.5%	10.3%	7.6%	13.6%	6.4%	5.9%	5.3%	8.5%	7.8%	10.3%	6.4%	10.3%	100.0%
Dollars	6.5	9.4	8.0	12.8	5.2	5.1	4.0	8.1	9.3	13.7	7.2	10.7	100.0

Source for above tables: NPD Research.

Women's Fur, Fur-like & Pile Coats

Percent of Purchases by Store Type, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Department stores	29.6	30.4
National chains	26.5	16.1
Discount stores, incl. K mart	8.5	3.9
Specialty stores	25.8	25.1
All other stores/no answer	9.6	24.4

Percent of Purchases by Price Points, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Less than $30	16.8	3.9
$30 - 59.99	35.6	18.0
$60 - 99.99	24.7	20.1
$100 - 139.99	9.9	12.9
$140 & over	13.0	45.2

(continued)

Women's Fur, Fur-like & Pile Coats (continued)

Percent of Purchases by Months, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	12.0%	9.5%	2.4%	1.2%	0.4%	--	4.3%	3.4%	12.8%	11.0%	19.5%	23.4%	100.0%
Dollars	9.7	9.0	2.4	0.4	0.1	--	2.4	2.1	7.3	9.7	31.5	25.3	100.0

Source for above tables: NPD Research

Women's All Weather Coats

Percent of Purchases by Store Type, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Department stores	35.6	42.9
National chains	18.7	13.9
Discount stores, incl. K mart	12.4	7.7
Specialty stores	27.1	30.4
All other stores/no answer	6.2	5.1

Percent of Purchases by Price Points, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Less than $30	24.0	10.4
$30 - 49.99	30.6	23.0
$50 - $69.99	21.6	24.2
$70 - $99.99	16.6	25.7
$100 & over	7.1	16.7

Percent of Purchases by Month, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	8.5%	7.5%	15.2%	10.1%	6.9%	2.0%	4.8%	6.1%	5.5%	8.6%	12.4%	12.3%	100.0%
Dollars	9.7	9.8	14.8	8.3	5.1	1.4	3.7	6.0	6.5	7.5	13.0	14.3	100.0

Source for above tables: NPD Research.

Women's Raincoats

Percent of Purchases by Store Type, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Department stores	28.4	37.4
National chains	16.2	12.0
Discount stores, incl. K mart	19.3	8.3
Specialty stores	29.1	34.5
All other stores/no answer	7.0	7.8

Percent of Purchases by Price Points, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Less than $20	38.1	10.4
$20 - 39.99	33.7	31.6
$40 - 69.99	18.9	31.5
$70 - 99.99	5.8	14.3
$100 & over	3.5	12.1

Percent of Purchases by Month, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	4.6%	7.4%	15.7%	9.0%	7.9%	7.8%	9.1%	11.7%	4.5%	10.6%	4.7%	7.0%	100.0%
Dollars	5.0	7.9	19.2	9.4	7.8	7.2	6.4	9.7	3.3	11.6	5.9	6.7	100.0

Source for above tables: NPD Research.

FURS

Market Trends

Despite the uneven state of the U.S. economy, consumers continue to purchase furs. Retail sales of furs continued the steady sales climb which began in the early 1970's. In 1980, sales reached $944 million, up from $858.4 million in 1979 and a more than two-fold increase over 1971 sales of $293.4 million.

The typical fur customer comes from the higher income groups which are least affected by poor economic conditions. The potential fur market has expanded in recent years, along with the large increase in the number of working women during the 1970's. Continued growth is foreseen in the 1980's as well, with the number of professional women rising at a faster rate than overall female employment. These professional women constitute a big part of the fur market. The rise in the number of two-income families also provides the fur industry with potential new customers, both male and female.

Currently, the men's fur segment is estimated at 10 to 15% of total fur sales. According to Daily News Record (March 20, 1980), detailing of the fur and the type of fur used are the most important considerations in the design of a man's fur coat. Traditionally, racoon and coyote have been the most popular furs for men, and reversible furs are also gaining popularity because of their practicality. In styling, straight cigarette shapes and V-shapes are preferred by males over styles that flair from the waist.

The fur customer is purchasing furs at a younger age than in the past. Formerly, much of the market's sales were to women over 50. Now, however, furs are viewed as fashion items and retailers report brisk sales to men and women in their 20's and 30's.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The latest detailed information on the fur industry is contained in the 1978 Annual Survey of Manufactures. The data has been adjusted for comparability with the 1977 census.

Shipments by manufacturers classified in the fur goods industry exceeded $404 million in 1978, 5.4% higher than 1977 shipments. The value added by manufacture in 1978 was $116.1 million, a 16.1% increase.

GENERAL STATISTICS ON THE INDUSTRY

Fur Goods (SIC 2371*)

	1978	1977	1972	% Change 1978/1977
Number of companies	na	620	796	--
Number of establishments, total**	na	620	797	--
Number with 20 or more employees	na	48	48	--
Employees, total (thous.)	3.9	4.0	4.7	- 2.5%
Production workers (thous.)	3.1	3.2	4.0	- 3.1
Payroll (mil. $)	$ 51.6	$ 51.5	$ 41.2	+ 0.2
Value added by manufacture# (mil. $)	116.1	112.8	86.2	+ 2.9
Value of shipments## (mil. $)	404.1	383.4	220.0	+ 5.4
Capital expenditures, new (mil. $)	0.8	0.5	1.1	+60.0

na = not available

*SIC 2371 includes establishments primarily engaged in manufacturing fur coats and other garments, accessories, and trimmings made of fur. The industry includes producers of fur caps, coat linings, glove linings and other fur apparel, such as capes, coats, hats, jackets and neckpieces. Establishments primarily engaged in manufacturing sheep-lined clothing are classified in Industry 2386, and those engaged in dyeing and dressing of furs in Industry 3999.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished goods inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in the industries. The value of shipments of fur goods only, by all producers, including manufacturers making them as secondary products, is covered on page 32.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1972, 1977,
Annual Survey of Manufactures, 1978.

GENERAL STATISTICS ON THE INDUSTRY

Fur Goods Manufacturing Establishments by Employment Size, 1977

	Establishments		Value of Shipments	
	No.	% of Total	Mil. $	% of Total
Fur goods (SIC 2371*), total	620	100.0%	$383.4	100.0%
By Establishment Size:				
Under 5 employees	401	64.7	56.1	14.6
5-9 employees	104	16.8	65.9	17.2
10-49 employees	104	16.8	195.1	50.9
50 or more employees	11	1.8	66.3	17.3

*For a definition of this SIC number, see page 30.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

Employment & Share of Shipments in Large Plants, 1980

	No. of Plants		Total	% of Shipments
	With 20+ Employees	With 100+ Employees	Shipments (Mil. $)	From Plants With 100+ Employees
Fur goods (SIC 2371*)	117	6	$436.8	16%

*For a definition of this SIC code, see page 30.

Source: Sales & Marketing Management Magazine,
Survey of Industrial Purchasing Power 1981,
(All rights reserved.)

Manufacturers' Operating Ratios

Selected Business Ratios in the Fur Goods Industry, 1979
(Median Results)

	1979
Number of firms reporting	76
Current assets to current debt (times)	1.54
Net profits on net sales (percent)	1.42
Net sales to inventory (times)	7.9
Net sales to net working capital (times)	8.95
Average collection period (days)	36

Source: Dun & Bradstreet, Inc.
Business Economics Division,
(All rights reserved.)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

New York State accounted for 85.6% of all manufacturing establishments engaged in the fur goods industry in 1977. This was down from New York's 97% of all establishments as reported in the 1972 Census of Manufactures. Despite this drop, shipments from New York plants totaled 91.0% of the total value of industry shipments in 1977.

The Fur Goods Industry by Region, 1977

	Establishments		Value of Shipments	
	Total	20 or more Employees	Millions of $	% of Total
Fur goods, U.S. total	620	48	$383.4	100.0%
Middle Atlantic region:				
New York	531	40	349.0	91.0
All other states	89	8	34.4	9.0

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-23.

SHIPMENTS

The total value of shipments of furs for men and for women reported by U.S. manufacturers reached close to $385 million in 1978, the latest year available. This was 7.4% higher than the 1977 total.

Value of Shipments of Fur Goods by All U.S. Producers, 1977, 1978
(Millions of Dollars)

	Value of Shipments			% Change 1978/1977	% Change 1978/1972
	1978	1977	1972		
Fur goods, total	$384.9	$358.5	$213.6	+7.4%	+80.2%

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977, 1972,
Annual Survey of Manufactures, 1978,
M78(AS)-2.

FOREIGN TRADE

Imports

Imports of fur apparel and other fur articles were valued at close to $89 million in 1980 (CIF), according to the Department of Commerce.

Hong Kong replaced Korea as the leading country of origin. The value of imports from Hong Kong rose 17.7%, and represented almost a third of the reported 1980 total. Imports from Korea gained less than 7% compared with 1979 and represented 29.9% of the total. Imports from Canada were valued at $11.5 million, or 12.9% of total imports.

(continued)

Imports (continued)

Imports of Fur Clothing & Articles by Leading Country of Origin, 1979, 1980

	Value CIF* (Thous. $) 1980	Value CIF* (Thous. $) 1979	% Change 1980/1979
Fur clothing & articles	$88,839	$82,554	+ 7.6%
Hong Kong	29,263	24,867	+17.7
Korea	26,603	24,915	+ 6.8
Canada	11,456	10,954	+ 4.6

*The CIF value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Department of Commerce,
U.S. General Imports FT 135,
December 1979, 1980.

In 1980, the value of imported fur skins was $143.8 million (CIF), down 20.7% from the 1979 import value. Mink fur skins (except Japanese mink) declined 17.9% in value.

U.S. Imports of Fur Skins, 1979, 1980

	Quantity (Thous. Units)			Value CIF* (Thous. $)		
	1980	1979	% Change 1980/1979	1980	1979	% Change 1980/1979
Fur skins, whole, raw or undressed, total	na	na	---	$143,791	$181,446	- 20.7%
Mink, excl. Japanese mink	2,567.8	3,083.2	- 16.7%	82,507	100,475	- 17.9
Persian lamb & caracul	74.5	73.8	+ 0.9	1,403	1,011	+ 38.8
Beaver	89.1	59.3	+ 50.2	2,887	1,951	+ 48.0
Fox, excl. silver, black or platinum	306.9	269.7	+ 13.8	19,309	27,919	- 30.8
Hare	1,412.3	2,088.1	- 32.4	1,142	1,339	- 14.7
Ocelot	1.6	nr	--	57	nr	--
Otter	18.2	0.5	+3,540.0	268	49	+446.9
Rabbit (quantity in thous. lbs.)	4,552.2	4,928.6	- 7.6	8,882	10,641	- 16.5
Sable	112.8	142.5	- 20.8	8,661	11,431	- 24.2
Fur skins, whole, raw or undressed, n.s.p.f.	18.3	26.2	- 30.1	18,675	26,630	- 29.9

na = not available
nr = not reported
n.s.p.f. = not specially provided for
* For a definition of the CIF value, see preceding table.

Source: U.S. Department of Commerce,
U.S. General Imports FT 135,
December 1979, 1980.

FOREIGN TRADE

Exports

Exports of wearing apparel and articles made of fur skins rose 33.2% in 1980 to $83.1 million compared to $62.4 million in 1979. Wearing apparel and articles made of mink were valued at $42.7 million, 23.5% above the 1979 export value. Wearing apparel and articles made from fur skins, other than mink, rose at an even faster rate of 45.2% to $40.4 million.

The Federal Republic of Germany (West Germany) was the primary recipient of U.S. produced furs. Almost 32% of the total value of reported fur exports went to this country. Switzerland imported 22.5% of the total export value. Japan was the third leading country of importation.

Exports of Fur Apparel & Articles by Leading Country of Importation, 1979, 1980

	Value (Thous. $)		% Change
	1980	1979	1980/1979
Wearing apparel & articles, n.s.p.f., of fur skins, total	$83,105	$62,405	+ 33.2%
Wearing apparel & articles, n.s.p.f., of mink fur skins	42,702	34,586	+ 23.5
Federal Republic of Germany	11,717	11,890	- 1.5
Switzerland	10,203	6,515	+ 56.6
Japan	8,728	5,652	+ 54.4
Wearing apparel & articles, n.s.p.f., of fur skins, other than mink	40,403	27,819	+ 45.2
Federal Republic of Germany	14,672	8,299	+ 76.8
Switzerland	8,511	6,154	+ 38.3
Japan	2,293	5,036	- 54.5

n.s.p.f. = not specially provided for

*This value represents the value at the U.S. port of export, based on the transaction price including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance and any other charges or transportation cost beyond the port of exportation.

Source: U.S. Department of Commerce,
U.S. General Exports FT 410,
December 1979, 1980.

RETAIL SALES BY STORE TYPE

According to the latest official source, the 1977 Census of Retail Trade compiled by the U.S. Census Bureau, the number of furriers and fur shops declined 6.5% from 1972 to 1977, but sales were up 62%. Most of the volume reflects women's fur sales, although sales of men's furs have gained sharply in the past two years.

Furriers & Fur Shops, 1972, 1977

Number		Sales (Thous. $)	
1977	1972	1977	1972
1,887	2,018	$322,345	$199,478

Source: U.S. Bureau of the Census, Census of Retail Trade, 1977, 1972.

In the merchandise line sales reports, issued in the 1977 census of retail trade, a total of $364.6 million in retail sales of women's furs and fur garments was reported. Women's ready-to-wear stores accounted for over 47% of this total, department stores, 45.2%.

Reported Sales of Women's Furs & Fur Garments By Store Type (Not Including Furriers), 1977

(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's furs & fur garments	8,486	100.0%	$364.6	100.0%
Department stores**	3,231	38.1	164.6	45.2
Women's ready-to-wear stores	4,352	51.3	171.7	47.1
Family clothing stores	857	10.1	27.8	7.6
Children's wear stores	46	0.5	0.5	0.1

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data.

Source: Based on U.S. Bureau of the Census Census of Retail Trade, 1977, Merchandise Line Sales RC 77-L.

(continued)

Percent of Total Women's & Children's Wear Sales Accounted for by Women's Furs & Fur Garments Sales In Key Store Types Reporting Sales, 1977

	Total Women's & Children's Wear Sales* (Mil. $)	% of Total Accounted for by Women's Furs & Fur Garments
Department stores	$16,250.7	1.0%
Women's ready-to-wear stores**	11,066.5	1.5
Family clothing stores	3,471.6	0.8

*Excludes footwear sales.
**Excludes sales of women's accessory and specialty stores.

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

Department Stores

Fur department sales in department stores with sales over $1 million dropped a median 0.6% in 1979, according to the National Retail Merchants Association. Sales in all upstairs women's apparel departments in these stores rose a median 7.0% in comparison. However, sales per square foot of selling space did out perform the typical upstairs department, $152.8 versus $107.4. The number of stock turns in the fur department was, at 1.4 times, considerably lower than the 4.0 times in other female apparel departments in these department stores.

Merchandising & Operating Results of Fur Departments, 1979
(Median Results for Department Stores With Sales Over $1 Million)

	Adult Female Apparel (147*)	Furs & Fur Garments (44*)
Net sales, % change from last year	+ 7.0%	- 0.6%
Net sales, % of merchandise division	100.0	0.8
Net sales, % of total store sales	36.7	0.3
$ sales per square foot of selling space (main or largest selling unit)	$107.4	$152.8
Cumulative markon, %	50.2%	42.5%
Gross margin, % of net sales (including cash discounts)	43.6	38.8
Markdowns, retail, % of net sales	18.2	17.2
Number of stock turns (times)	4.0	1.4
Salespeople's salaries, % of sales (main or largest selling unit)	7.2	7.1
Sales promotion, % of net sales	3.1	3.7

*Number represents the number of reporting stores in each category.

Source: National Retail Merchants Association,
"Merchandising & Operating Results
of 1979," 1980 Edition.

RETAIL SALES BY STORE TYPE

Department Stores

Percent of Department Store Sales of Women's Furs By Month

	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Furs	100.0%	8.4%	6.0%	6.1%	6.1%	4.3%	2.4%	4.1%	9.0%	7.9%	12.4%	13.1%	20.2%

Source: Newspaper Advertising Bureau, based
on Federal Reserve Board data
(1961-1965)-latest available.

RETAIL ADVERTISING

Seasonality in Retailers' Newspaper Advertising Linage On Women's Furs & Fur Garments, 1978, 1979

Furs & Fur Garments	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1979	10.4%	8.4%	6.2%	4.3%	2.5%	1.6%	4.9%	10.2%	9.8%	11.1%	17.0%	13.6%
1978	12.6	9.6	7.9	4.5	3.3	1.8	6.3	9.0	7.3	8.5	13.9	15.3

Source: Advertising Checking Bureau,
George Neustadt, Inc., covering
retail newspaper linage in seven cities.

(For Consumer Buying Habit information on furs, see page 26.)

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store types.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (August): Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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Men's Tailored Clothing/ Separates and Rainwear

FACT FILE

Market Research Division
Fairchild Publications, New York

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Men's Tailored Clothing/ Separates and Rainwear

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E.B. Gold, Manager
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MEN'S TAILORED CLOTHING, SEPARATES AND RAINWEAR

Market Trends

The poor performance which has been registered by the $7 billion men's tailored clothing industry in recent years is expected to continue through 1981. In a recent financial meeting, a spokesman for Kurt Salmon Associates predicted that suits, which declined by 12% in 1980 would fall another 2% in terms of unit sales in 1981.

Tailored separates, however, are faring better. Jacket sales are expected to rebound from a 10% decline in 1980 and show a 3% rise this year. Slacks, the only reported category to show a rise in 1980 (3%), are expected to do even better in 1981, registering a 5% gain. Overall, this year is expected to be better than 1980.

The look and strategy involved in the men's tailored clothing field is undergoing rapid change. Increasingly, the target market for these clothes is the steadily growing, older segment of the population, the career man, especially the 35-49 year old bracket. By the year 2000, it is expected that this age group will be 64.6% larger than in 1980 and represent 23.3% of the total population. Many of the men in this group are changing their apparel buying habits to include more sophisticated, dressier clothing to fit new lifestyles and jobs. No longer are they content to wear jeans and sportswear for all occasions.

Retailers are changing their merchandise mix to accommodate their customers whose apparel buying habits are also being affected by inflationary/recessionary pressures. In a recent study it was reported that nearly 60% of all men's suits sales occur when promoted at off-price. No longer are the consumers exclusively buying the traditional "business suit" but are moving increasingly toward lower priced, highly versatile tailored separates. Tailored separates are expected to be the growth area for this industry in the future.

Imports continue to make gains in the men's tailored wear area, registering a 10.4% gain in units and a 5.6% rise in dollars in 1980 versus 1979. The top four exporters of this apparel to the U.S., all Far Eastern countries, accounted for over 53% of imports last year. Exports, on the other hand, skyrocketed to a 115.0% increase in unit volume and a 17.2% jump in dollar terms. This increase can partially be attributed to a weak U.S. dollar abroad which lowered the relative costs of these goods and made them competitive with their foreign produced counterparts.

Rainwear appears to be slowly recovering from poor performances which it registered in 1979 and 1980. Retailers though, are being extremely conservative with their purchases until it becomes apparent which way this cyclical is headed. Imports, a major factor in this market, declined in 1980 on both a unit and dollar volume basis when compared to 1979. The 27.4 million dozen imported in 1980 was 16.2% lower than in 1979 while the $9.5 million accounted for by these imports was 11.1% less than the $10.7 million registered in the previous year.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The 1978 annual survey of manufactures, compiled by the U.S. Census Bureau, covers the latest available industry information on men's wear at the manufacturer level. The ASM is based on a sample of manufacturers and is conducted in interim years between the complete census of manufacturers which is conducted every five years. The 1978 ASM data are adjusted for comparability with the latest census report (1977).

Data on men's tailored clothing industries and on waterproof outer garments, as classified in the Census Bureau reports, are summarized in the following tables.

Census Bureau data track the continued downtrend in the tailored clothing industries. By 1977 the number of plants primarily producing men's suits or coats showed a drop of almost 14% compared with 1972. Plants producing separate trousers declined almost 18%, from 624 in 1972 to 514. In the waterproof outer garment industry, which includes plants producing women's as well as men's rainwear, etc., the number of plants dropped 35% in the five year period.

Men's & Boys' Suits & Coats (SIC 2311*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	618	721	--	- 14.3%
Number of establishments**	na	737	856	--	- 13.9
Employees, total (thous.)	97.8	98.7	124.8	- 0.9%	- 20.9
Production workers (thous.)	85.4	86.2	108.3	- 0.9	- 20.4
Payroll (mil. $)	$ 853.0	$ 822.2	$ 770.3	+ 3.7	+ 6.7
Value added by manufacture# (mil. $)	$1,534.2	$1,574.4	$1,342.2	- 2.5	+ 17.3
Value of shipments## (mil. $)	$2,653.0	$2,767.5	$2,396.9	- 4.1	+ 15.5
Capital expenditures, new (mil. $)	25.9	25.8	22.5	+ 0.4	+ 14.7

Men's & Boys' Separate Trousers (SIC 2327*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	405	463	--	- 12.5%
Number of establishments**	na	514	624	--	- 17.6
Employees, total (thous.)	65.7	70.9	91.3	- 7.3%	- 22.3
Production workers (thous.)	58.0	61.9	81.8	- 6.3	- 24.3
Payroll (mil. $)	$ 469.8	$ 474.0	$ 439.3	- 0.9	+ 7.9
Value added by manufacture# (mil. $)	$ 983.0	$ 845.6	$ 784.9	+ 16.2	+ 7.7
Value of shipments## (mil. $)	$1,946.6	$1,718.0	$1,745.0	+ 13.3	- 1.5
Capital expenditures, new (mil. $)	26.6	22.8	22.2	+ 16.7	+ 2.7

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Waterproof Outer Garments (SIC 2385*)

	1978	1977	1972	% Change	
				1978/1977	1977/1972
Number of companies	na	155	236	--	- 34.3%
Number of establishments**	na	167	257	--	- 35.0
Employees, total (thous.)	12.0	12.0	15.4	nc	- 22.1
Production workers (thous.)	10.4	10.1	13.2	+ 3.0%	- 23.5
Payroll (mil. $)	$ 91.5	$ 89.4	$ 86.4	+ 2.3	+ 3.5
Value added by manufacture# (mil. $)	$ 191.9	$ 194.4	$ 168.8	- 1.3	+ 15.2
Value of shipments## (mil. $)	$ 373.7	$ 348.8	$ 332.1	+ 7.1	+ 5.0
Capital expenditures, new (mil. $)	1.6	5.6	2.4	- 71.4	+133.3

na = not available
nc = no change
(r) = revised

*Manufacturers are classified by industry under the Standard Industrial Classification system (SIC) determined by the principal product made, as shown below:

SIC 2311 comprises establishments primarily engaged in manufacturing men's, youth's, and boys' suits, coats and overcoats, as well as tailored dress and sport coats. Establishments primarily engaged in manufacturing uniforms (military, policemen's, firemen's, etc.) are also included. Those manufacturers engaged primarily in making work and sport garments are not included.

SIC 2327 comprises establishments primarily engaged in manufacturing men's, youth's and boys' separate slacks and trousers.

SIC 2385 comprises establishments primarily engaged in manufacturing raincoats from purchased rubberized fabrics and other waterproof outer garments made from such material as pliofilm and cellophane. The industry includes manufacturers of garments for men, women and children.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value of measure of individual industries.

##Value of shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). The total value of specific products shipped by both those classified in the industry (primary producers) and by secondary producers (who are classified in other industries) is covered on page 17 for the latest year available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1972, 1977;
Annual Survey of Manufactures, 1978.

GENERAL STATISTICS ON THE INDUSTRY

Employment and Earnings

Current information on employment in segments of the men's and boys' tailored wear industry is published by the U.S. Bureau of Labor Statistics. Production worker employment in men's and boys' suits and coats averaged 68,800 workers in 1980, down 8.1% from 74,900 in 1979. The Bureau reported 78,700 people employed in the men's and boys' suits and coats segment of the industry. This figure is down 9.1% from the total of the previous year.

In the men's and boys' separate trousers area, production worker employment averaged 69,200 workers in 1980 against 68,900 in 1979. This is a reduction of 0.4%. Total employment in this segment remained static between 1979 and 1980 at 79,300 people.

Employment and Earnings in Selected Men's & Boys' Tailored Wear Industries, 1979, 1980
(Annual Averages)

	1980	1979	% Change 1980/1979
Men's & boys' suits & coats:			
All employees (thous.)	78.7	86.9	- 9.4%
Production workers (thous.)	68.8	74.9	- 8.1
Average weekly earnings	$192.60	$180.58	+ 6.7
Average weekly hours	36.0	35.2	+ 2.3
Average overtime hours	0.8	0.6	+33.3
Men's & boys' separate trousers:			
All employees	79.3	79.3	nc
Production workers	69.2	68.9	+ 0.4%
Average weekly earnings	$149.14	$139.65	+ 6.8
Average weekly hours	35.4	35.0	+ 1.1
Average overtime hours	0.9	0.8	+12.5

nc = no change

Source: U.S. Bureau of Labor Statistics, Employment and Earnings, March issues 1980, 1981.

Concentration in the Industry

Following the general trend in the apparel industry, men's tailored wear industries have been consolidating into fewer but larger companies.

The total number of plants in the men's and boys' tailored wear and waterproof garment industries declined 5.3% between 1972 and 1977 to 1,401 establishments. The sharpest drop in manufacturing facilities was registered by the waterproof outer garment segment which declined 35.0% from 257 units in 1972 to 167 in 1977. Less drastic declines of 13.9% and 17.6% were marked by the suits and coats, and the separate trouser segments which went from 856 and 624 facilities to 737 and 514, respectively, between 1972 and 1977.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Employment in the men's tailored clothing industries is highly concentrated in the larger plants. In 1977, in the men's suit and coat industry, only 16.0% of all establishments had over 250 workers, yet they employed 62.0% of the industry's work force. In the separate trouser segment, plants with 250 or more employees represented only 15.9% of the industry total and accounted for 61.2% of employment during the same year. The waterproof outer garment segment was less concentrated. In this industry 6.0% of the plants, represented by those with 250 or more employees, accounted for 38.3% of employment during 1977.

In 1980, 91% of total shipments were accounted for by plants with 100 or more employees in the men's and boys' suit and coat industry. The men's and boys' trouser segment had 94% of its shipments credited to the same size plants while the waterproof outer garment area showed a slightly lower 79% concentration of shipments from plants with 100 or more employees during the same period.

The Men's Tailored Wear Industries by Employment Size, 1977

	Establishments		Employees		Annual Payroll	
	Number	%	Number	%	Mil.$	%
Men's & boys' suits & coat industry, total	737	100.0%	96,700	100.0%	$822.2	100.0%
By establishment size:						
Under 10 employees	196	26.6	600	0.6	5.7	0.7
10-49	180	24.4	4,700	4.9	41.0	5.0
50-249	243	33.0	31,400	32.5	244.5	29.7
250 or more	118	16.0	60,000	62.0	531.0	64.6
Separate trouser industry, total	514	100.0%	70,900	100.0%	$474.0	100.0%
By establishment size:						
Under 10 employees	125	24.3	300	0.4	11.8	2.5
10-49	116	22.6	2,700	3.8	20.3	4.3
50-249	191	37.2	24,500	34.6	156.8	33.1
250 or more	82	15.9	43,400	61.2	285.0	60.1
Waterproof outer garment industry, total	167	100.0%	12,000	100.0%	$ 89.4	100.0%
By establishment size:						
Under 10 employees	38	22.8	100	0.8	0.9	1.0
10-49	73	43.7	1,900	15.8	15.7	17.6
50-249	46	27.5	5,400	45.0	39.1	43.7
250 or more	10	6.0	4,600	38.3	33.8	37.8

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A,
MC77-1-23D.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Employment & Share of Shipments of Men's Tailored Wear Industries in Large Plants, 1977-1980

	Number of Plants		% of total shipments accounted for by plants with 100+ employees
	With 20+ Employees	With 100+ Employees	
Men's & boys' suits & coats (SIC 2311*)			
1980	461	273	91%
1979	517	309	91
1978	517	315	92
1977	502	317	92
Men's & boys' separate trousers (SIC 2327*)			
1980	411	303	94%
1979	461	323	92
1978	472	335	93
1977	466	348	94
Waterproof outer garments (SIC 2385*)			
1980	114	46	79%
1979	123	48	79
1978	118	49	81
1977	106	46	80

*For definitions of SIC numbers, see page 3.

Source: Sales & Marketing Management, "Survey of Industrial Buying Power," 1978, 1979, 1980, 1981 editions. (All rights reserved.)

Operating Ratios

Key Business Ratios in the Men's Tailored Wear Industries, 1980
(Median Results)

	Men's & Boys' Suits & Coats	Men's & Boys' Separate Trousers	Waterproof Outerwear
Number of manufacturing firms reporting	135	92	28
Current assets to current debt (times)	2.03	2.00	2.01
Net profits to net sales (percent)	2.43	1.69	0.71
Net profits to net worth (times)	12.67	13.03	15.83
Net sales to net worth (times)	4.87	5.45	5.13
Net sales to net working capital (times)	5.26	5.56	5.33
Average collection period (days)	40	41	50
Net sales to inventory (times)	5.6	5.9	8.5

Source: Dun & Bradstreet, Inc.
Business Economics Division,
1980 Key Business Ratios
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GENERAL STATISTICS ON THE INDUSTRY

By Leading States

New York State accounted for the major share of industry plants in 1977 with 23.9% of the total, followed closely by Pennsylvania and Massachusetts which represented 13.9% and 6.5%, respectively. Combined, these three states contained 628 of the industries 1,418 plants.

Pennsylvania is the leading state in employment, with 27,200 employees or 15.0% of the industries 181,600 workers. This is due to the fact that Pennsylvania has a higher proportion of large plants than in New York, which ranks second in employment with 25,100 workers (13.8%).

Men's Tailored Wear Industries
By Leading States, 1977

	Number of Establishments		Employees	
	Total	20 or more Employees	Total (Thous.)	% of Total
Men's & boys' suits & coats (SIC 2311*)				
Total U.S.	737	467	98.7	100.0%
New England				
Massachusetts	62	39	na	na
Rhode Island	3	3	0.3	0.3%
Connecticut	4	3	0.3	0.3
Middle Atlantic				
New York	174	82	15.4	15.6
New Jersey	41	28	4.8	4.4
Pennsylvania	139	103	22.2	22.5
North Central				
Minnesota	12	10	0.7	0.7
Ohio	15	5	4.2	4.3
South Atlantic				
Maryland	33	22	4.0	4.1
Georgia	27	26	6.8	6.9
Florida	14	8	1.0	1.0
South Central				
Kentucky	13	13	4.0	4.1
Tennessee	21	17	5.3	5.4
Texas	18	12	2.5	2.5
Pacific				
California	48	13	2.2	2.2

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Leading States

Men's Tailored Wear Industries
By Leading States, 1977
(continued)

	Number of Establishments		Employees	
	Total	20 or more Employees	Total (Thous.)	% of Total
Men's & boys' separate trousers (SIC 2327*)				
Total U.S.	514	335	70.9	100.0%
New England				
Massachusetts	16	8	0.9	1.3
Middle Atlantic				
New York	103	33	7.8	11.0
New Jersey	13	5	na	na
Pennsylvania	53	42	4.8	6.7
North Central				
Ohio	8	6	0.8	1.1
Missouri	18	13	2.3	3.2
South Atlantic				
Maryland	14	8	0.5	0.7
Virginia	9	7	1.9	2.7
Georgia	58	56	9.5	13.4
Florida	13	8	1.0	1.4
South Central				
Tennessee	21	15	5.8	8.1
Alabama	27	27	5.4	7.6
Mississippi	23	17	4.5	6.3
Arkansas	12	12	3.2	4.5
Louisiana	13	11	2.7	3.8
Texas	25	19	10.6	15.0
Pacific				
California	41	15	2.0	2.8
Waterproof outer garments (SIC 2385*)				
Total U.S.	167	105	12.0	100.0%
New England				
Massachusetts	14	10	0.8	6.6
Middle Atlantic				
New York	62	37	1.9	15.8
New Jersey	18	14	1.0	8.3
Pennsylvania	5	3	0.2	1.7
South Atlantic				
Maryland	11	10	3.3	27.5
Georgia	10	8	0.9	7.5
South Central				
Alabama	3	3	0.5	4.2

(footnotes continued on next page)

GENERAL STATISTICS ON THE INDUSTRY

By Leading States

*For full definitions of SIC numbers, see page 3.
na = not available.
States with information withheld due to disclosure are not shown.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-23A,
MC77-1-23D.

PRODUCTION

Reports on a monthly industry survey conducted by the Census Bureau covering a sample of manufacturers indicate that cuttings of men's suits in U.S. plants in 1980 dropped about 9% below the 1979 total. Output of dress and sport coats, however, showed an increase of about 25%; cuttings of men's trousers declined 1.6%, according to survey data which is subject to revision when the Bureau issues the annual Current Industrial Report on apparel.

Cuttings of all types of men's tailored wear items (not including rainwear) covered in the latest annual report totaled 164.6 million units in 1979, advancing slightly less than 1% over the 1978 total.

Separate vests, excluding sweater vests, showed the greatest gain in production in 1979, up 11.8% to 5,100,000 units. Suit-type dress and sport coats registered the second largest jump in production by climbing from 14,966,000 units in 1978 to 15,603,000 in the following year, a 4.3% increase. The largest category, separate dress and sport trousers, (75.7% of total reported production), rose 1.7% during this period to 124,688,000 units.

Men's overcoats, topcoats, and tailored suburban and car coats registered the largest decline in production between 1978 and 1979, a 30.9% fall to 3,317,000 units. Cuttings of tailored suits fell to 15,935,000 units, a 9.1% drop compared with 1978. Output of all rainwear was down almost 25%.

(continued)

PRODUCTION

Production of Men's Tailored Clothing & Rainwear (Men's & Boys') in the U.S., 1979, 1978
(In Thousands of Units)

	1979	1978	% Change 1979/1978
Tailored clothing, total	164,643	164,490	+ 0.9%
Suits, including uniforms	15,935	17,526	- 9.1
Overcoats, topcoats & tailored suburban & car coats, including uniform	3,317	4,801	-30.9
Tailored suit-type dress & sports coats, including uniform	15,603	14,966	+ 4.3
Separate vests, excluding sweater vests	5,100	4,536	+12.4
Separate dress & sport trousers, including uniform	124,688	122,661	+ 1.7
Raincoats (men's & boys'), including plastic	3,672	4,874	-24.7

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A(79-1).

Explanation of Terms:

Tailored suits—include formal suits and tailored uniforms. Exclude casual suits, ski and snow suits and boys' suits.
Overcoats, topcoats, tailored suburban, car and stormcoats—include only tailored items, including uniform, reversible, zipper-lined, fingertip, and wool water-repellent coats. Excludes raincoats.
Tailored suit-type sportcoats and jackets—include only tailored separate suit-type coats, including tailored uniform and separate formal jackets.
Separate dress and sport trousers, including uniform—include all pants except jeans, jean-cut casuals, dungarees and work pants.
Raincoats—include waterproof outercoats and water-repellent coats of cotton and man-made fibers, including uniform. Wool and chiefly wool water-repellent coats are included under overcoats, topcoats, etc.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A(79-1).

The annual Current Industrial Report summary for 1979 showed production of men's tailored wear items by price line and by fabric construction based on manufacturers reporting in this detail. Since the number of manufacturers supplying the breakdowns by price and fabric varies from year to year, comparisons must be used with caution, to indicate a general trend rather than a measure of actual gains or losses.

PRODUCTION

By Price Line

Production of Men's Tailored Wear by Factory (Wholesale) Price Line, 1978, 1979

	1979	1978	Percent Change in Units 1979/1978
Tailored suits, including uniforms (thous. of units)	15,935	17,526	- 9.1%
Percent:	100.0%	100.0%	
Under $50.00	18.1	22.1	-25.3
$50.00 - $62.49	25.5	24.9	- 7.0
$62.50 - $99.99	35.4	26.5	+21.4
$100.00 - 149.99	14.4	16.4	-20.6
$150.00 & over	3.1	2.3	+21.2
Price unspecified	3.5	7.7	-52.6
Suit-type dress and sports coats (thous. of units)	15,603	14,966	+ 4.3
Percent:	100.0%	100.0%	
Under $24.00	10.9	18.6	-38.8
$24.00 - $37.49	34.8	36.2	nc
$37.50 - $44.99	9.7	6.1	+65.2
$45.00 - $57.49	10.6	9.0	+26.0
$57.50 - $62.49	3.0	3.8	-16.9
$62.50 & over	18.3	16.7	+14.2
Price unspecified	12.4	9.6	+35.3
Dress & sport trousers, (thous. of units)	124,688	122,661	+ 1.7
Percent:	100.0%	100.0%	
Under $5.00	4.9	4.9	+ 1.2
$5.00 - $8.99	35.3	37.3	- 3.9
$9.00 - $12.49	36.8	34.9	+ 7.3
$12.50 & over	18.4	17.8	+ 5.3
Price unspecified	4.6	5.1	- 8.2

nc = no change

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A(79-1)

NOTE: Production of rainwear by price line was not reported by the Census Bureau for 1978 and 1979.

By Fabric/Construction

Although the men's tailored clothing industry is swinging strongly toward natural fabrics, trade information indicates that all-polyesters will represent about 15 to 25% of many companies' spring 1982 business. Many clothing executives contend that the only way they can keep their suits under the $200 retail range and sport coats below $100 is through the use of all-polyester fabrics. They generally point out that for spring 1982 vested suits in such major fabric classifications as polyester/worsteds and polyester/wool/silk blends will be priced to sell in stores at more than $200. (Daily News Record, June 16, 1981).

(continued)

PRODUCTION

By Fabric/Construction

All-polyesters continue to represent an important fabric in clothing separates although natural fabric concepts are maintaining strength in that category, too.

Among clothing companies that are stressing man-made fabrics, fabrics that incorporate many new salable features are being used, such as the stretch feature, wrinkle-resistance and machine washability—particularly in clothing separates.

The distribution of 1978 and 1979 cuttings of men's tailored clothing, by type of fabric and construction, based on manufacturers reporting to the Census Bureau, is covered in the following table.

Production of Reported Types of Men's Tailored Wear
By Fabric & Construction, 1978, 1979

	1979	1978	% Change in Units 1979/1978
Tailored suits, including uniforms (thous. of units)	15,935	17,526	- 9.1%
Percent:	100.0%	100.0%	
Woven fabric:	84.3	80.4	- 4.7
All cotton & chiefly cotton	1.4	1.4	- 7.6
Man-made/wool blends, chiefly man-made	32.3	31.2	- 5.8
All man-made & chiefly man-made, except man-made/wool blends	37.2	31.7	+ 6.4
All wool & chiefly wool	11.8	12.9	-17.3
All other fabric	1.6	3.2	-52.9
Knit fabric:	6.9	9.1	-28.2
All cotton & chiefly cotton	na	na	na
All man-made & chiefly man-made	6.4	7.2	-16.3
All other fabric	0.5	1.9	-76.9
Fabric, n.s.k.	8.8	10.8	-25.3
Overcoats, topcoats, & tailored suburban & car coats, incl. uniforms (thous. of units)	3,317	4,801	-30.9
Percent:	100.0%	100.0%	
By fabric:			
All man-made & chiefly man-made	37.8	38.3	-31.7
All wool & chiefly wool	36.2	34.3	-27.5
All other fabric	13.6	13.7	-31.6
Fabric, n.s.k.	12.5	13.7	-36.7
By construction:			
Woven fabric	90.2	89.8	-30.6
Knit fabric	1.8	2.3	-45.5
Construction, n.s.k.	8.0	7.8	-30.2

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Types of Men's Tailored Wear By Fabric & Construction, 1978, 1979

(continued)

	1979	1978	% Change in Units 1979/1978
Suit type dress & sports coats (thous. of units)	15,603	14,966	+ 4.3%
Percent:	100.0%	100.0%	
Woven fabric:	79.2	81.1	+ 1.8
All cotton & chiefly cotton	4.9	9.3	-44.8
Man-made/wool blends, chiefly man-made	16.5	18.5	- 6.9
All man-made & chiefly man-made, except man-made/wool blends	35.5	35.0	+ 5.6
All wool & chiefly wool	18.8	13.2	+49.0
All other fabric	3.3	5.0	-31.0
Knit fabric:	11.2	10.6	+ 6.7
All cotton & chiefly cotton	na	na	na
All man-made & chiefly man-made	10.6	10.3	+ 7.6
All other fabric	0.2	0.3	-23.3
Fabric, n.s.k.:	8.8	8.3	+25.7
Separate vests, excl. sweater vests, (thous. of units)	5,100	4,536	+12.4
Percent:	100.0%	100.0%	
By fabric:			
All cotton & chiefly cotton	14.2	26.6	-40.2
All man-made & chiefly man-made	66.1	56.1	+32.0
All wool & chiefly wool	3.0	3.1	+ 7.1
All other fabric	0.5	2.4	-78.2
All fabric, n.s.k.	16.3	11.8	+55.1
By construction:			
Woven fabric	88.1	82.7	+19.7
Knit fabric	5.7	8.2	-21.2
Construction, n.s.k.	6.2	9.1	-23.5
Separate dress & sport trousers, incl. uniform (thous. of units)	124,688	122,661	+ 1.7
Percent:	100.0%	100.0%	
Woven fabric:	68.6	63.7	+ 9.4
All cotton & chiefly cotton	10.3	11.6	- 9.9
Man-made/wool blends, chiefly man-made	5.3	6.0	-10.5
All man-made & chiefly man-made except man-made/wool blends	45.3	38.1	+20.9
All wool & chiefly wool	4.1	4.0	+ 4.0
All other fabric	3.6	4.0	- 7.8

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Types of Men's Tailored Wear By Fabric & Construction, 1978, 1979 (continued)

	1979	1978	% Change in Units 1979/1978
Separate dress & sport trousers, incl. uniform (continued)			
Knit fabric:	31.4	36.3	-12.0%
All cotton & chiefly cotton	2.9	2.7	+ 8.1
All man-made & chiefly man-made	22.8	26.0	-10.8
All other fabric	0.1	0.7	-86.5
Fabric, n.s.k.	5.6	6.8	-16.7
Men's & boys' raincoats, incl. uniform	3,672	4,874	-24.7
Percent:	100.0%	100.0%	
By fabric:			
Plastic, rubberized or coated fabric	27.8	44.9	-53.3
Uncoated fabric:			
All cotton & chiefly cotton	1.3	0.8	+28.9
All man-made & chiefly man-made	46.4	35.4	- 1.4
All other fabric	4.7	4.3	+ 1.8

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census, Current Industrial Reports, *Apparel* MA-23-A(79-1).

PRODUCTION

Materials Consumed in Production

Value of Materials Consumed by Kind, 1977
(Millions of Dollars)

	Delivered Costs	% of Total Costs
Men's & boys' suits & coats, total	$846.8	100.0%
Broadwoven fabrics	445.2	52.6
Purchased knitted fabrics	57.1	6.7
All other materials & components, parts, containers & supplies	161.5	19.1
Materials, parts, containers & supplies, n.s.k.	183.0	21.6
Men's & boys' separate trousers, total	658.2	100.0
Broadwoven fabric	316.5	48.1
Purchased knitted fabrics	94.5	14.4
All other components & materials, parts, containers & supplies	111.0	16.9
Materials, parts, containers & supplies, n.s.k.	136.2	20.7
Waterproof outer garments, total	105.2	100.0
Broadwoven fabrics	51.6	49.0
Purchased knitted fabrics	3.3	3.1
All other materials & components, parts, containers & supplies	21.7	20.6
Materials, parts, containers & supplies, n.s.k.	28.6	27.2

n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC-77-23A,
MC-77-23D.

Seasonal Patterns in Production

The table below shows the 1980 distribution of production by months in specified types of tailored wear, as reported in the Census Bureau's monthly survey.

(continued)

PRODUCTION

Seasonal Patterns in Production

Men's Tailored Wear
Percent of Year's Cuttings by Month, 1980

	Suits	Tailored Dress & Sport Coats	Trousers	Overcoats & Topcoats
Total	100.0%	100.0%	100.0%	100.0%
January	8.8	6.4	7.9	6.5
February	8.3	7.0	8.1	7.0
March	8.2	7.9	9.1	8.5
April	9.1	9.7	8.9	7.9
May	8.7	9.1	8.4	10.4
June	7.7	9.7	8.2	10.1
July	5.6	6.8	5.2	6.4
August	8.3	7.9	9.3	9.0
September	8.7	9.8	9.3	9.0
October	10.1	10.1	10.2	9.6
November	8.5	8.4	8.7	8.8
December	7.9	7.2	6.7	6.8

nr = not reported

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports,
Men's Apparel, Series M23B(80)-12.

SHIPMENTS

A preliminary estimate for the year 1980 on the value of shipments of suits and coats (including both men's and boys') by all producers, issued by the Bureau of Industrial Economics, U.S. Census Bureau (U.S. Industrial Outlook 1981), indicated a gain of less than 1% compared with the value of shipments in 1979. A decline of 11.5% was indicated in the value of shipments of separate trousers (men's and boys') in 1980 compared with 1979.

Industry estimates based on a sample survey covering shipments in 1979, issued by the Census Bureau in the Current Industrial Reports (which are not directly comparable to the broader-based 1977 census of manufactures, which includes smaller firms not covered in the CIR or to the annual survey of manufactures data) are reported below.

(continued)

SHIPMENTS

Value of Shipments of Reported Men's Tailored Wear Categories, 1979

	1979 (Mil. $)	% Change 1979/1978
Total, all reported tailored wear	$3,354.7	+ 3.3%
Tailored suits, including uniforms	1,151.6	- 4.1
Overcoats, topcoats & tailored suburban & car coats, including uniforms	138.4	-22.5
Men's & boys' raincoats, including uniforms	106.9	+ 5.1
Tailored suit-type dress & sport coats, including uniforms	673.5	+12.9
Separate dress & sport trousers, including uniform	1,226.5	+10.4
Separate vests, excluding sweater vests	57.8	+18.7
Raincoats (men's & boys')	106.9	- 5.1

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A(79-1).

The most comprehensive figures on shipments (including both primary producers and manufacturers classified in other industries who are secondary producers) are covered in the complete census of manufactures, compiled by the Census Bureau at five-year intervals, in years ending in "2" and "7." In interim years, the Census Bureau issues reports in an annual survey of manufactures which is based on a sample of manufacturing firms. The data obtained from the sample are adjusted by the Census Bureau for comparability with the complete census, and available findings for 1978 and 1977 are covered in the following table, as well as value of shipments in 1972.

(continued)

SHIPMENTS

Tailored Wear & Rainwear Shipments by All Producers 1972, 1977, 1978

	Quantity (thous.)		Value (Mil.$)			% Change
	1977	1972	1978	1977	1972	1978/1977
Men's tailored wear, total	201,972	279,659	$3,528.0	$3,384.5	$3,010.1	+ 4.2%
Men's suits, incl. leisure & uniform	19,362	18,877	1,287.9	1,273.4	898.5	+ 1.1
Men's overcoats & topcoats, tailored car & suburban coats, including uniform	5,197	3,352	184.3	179.8	97.0	+ 2.5
Men's tailored dress & sport coats & jackets, incl. uniform	19,514	21,237	628.5	623.0	626.5	+ 0.9
Men's & boys' separate dress & sport trousers (excl. jean-cut casual slacks)	157,899	236,013	1,427.3	1,308.3	1,388.1	+ 9.1
Rainwear, waterproof outer garments (men's & women's)	12,732	15,216	355.0	338.9	321.6	+ 4.7
Commission work on men's & boys' suits & coats	--	--	405.0	371.5	--	+ 9.0
Contract work on separate trousers	--	--	295.9	264.5	--	+11.9
Commission work on waterproof outer garments	--	--	26.6	25.8	--	+ 3.1

Source: U.S. Bureau of the Census, Census of
Manufactures, 1972, 1977;
Annual Survey of Manufactures, 1978.

By Leading States

Men's suits, sport coats and jackets output is centered in Pennsylvania, while Massachusetts accounted for the largest percentage of men's overcoats and topcoats shipped in 1977.

Pennsylvania accounted for almost 22% of men's suit shipments on a dollar basis, and 29% of the dress and sport coat and jacket shipments.

Value of Shipments of Men's Tailored Wear by All Producers by Leading States, 1972, 1977
(Millions of Dollars)

	1977	1972	% of Total* 1977
Men's Suits			
U.S. Total	$1,273.4	$898.5	100.0%
New England			
Massachusetts	100.1	na	7.8
Middle Atlantic			
New York	248.1	235.6	19.4
New Jersey	36.8	22.0	2.9
Pennsylvania	276.6	168.7	21.7

(continued)

SHIPMENTS

By Leading States

Value of Shipments of Men's Tailored Wear by All Producers by Leading States, 1972, 1977
(Millions of Dollars)
(continued)

	1977	1972	% of Total* 1977
Men's Suits (continued)			
Central			
Ohio	75.5	na	5.9%
Kentucky	52.9	na	4.2
Tennessee	57.8	na	4.5
South Atlantic			
Maryland	81.3	108.5	6.4
Georgia	99.4	51.1	7.8
Pacific			
California	39.4	na	3.1
Men's overcoats & topcoats			
U.S. Total	179.8	97.0	100.0
New England			
Massachusetts	37.6	na	20.9
Middle Atlantic			
New York	19.0	16.7	10.6
New Jersey	20.4	na	11.3
Pennsylvania	16.7	na	9.3
North Central			
Minnesota	14.8	na	8.2
South Atlantic			
Georgia	8.7	na	4.8
Dress & sport coats & jackets			
U.S. Total	623.0	626.5	100.0
New England			
Massachusetts	63.3	na	10.2
Middle Atlantic			
New York	70.5	134.0	11.3
New Jersey	31.0	40.4	5.0
Pennsylvania	180.2	135.4	28.9
North Central			
Ohio	27.3	30.0	4.8
Illinois	26.3	29.6	4.2
South Atlantic			
Maryland	20.1	44.7	3.2
Virginia	9.6	na	1.5
Georgia	27.8	39.0	4.5
South Central			
Kentucky	22.4	19.6	3.6
Tennessee	14.1	na	2.3

(continued)

SHIPMENTS

By Leading States

Value of Shipments of Men's Tailored Wear by All Producers by Leading States, 1972, 1977
(Millions of Dollars)
(continued)

	1977	1972	% of Total* 1977
Dress & sport coats & jackets (cont'd.)			
Pacific			
California	48.6	45.5	7.8%
Commission work on men's & boys' suits & coats			
U.S. Total	$ 371.5	$445.5	100.0
New England			
Massachusetts	21.3	27.9	5.7
Middle Atlantic			
New York	54.2	71.3	14.6
New Jersey	17.9	28.7	4.8
Pennsylvania	69.3	115.0	18.7
Central			
Missouri	5.8	na	1.6
Tennessee	19.3	10.4	5.1
Alabama	12.4	na	3.3
Mississippi	15.1	na	4.1
South Atlantic			
Maryland	16.4	24.6	4.4
Georgia	45.5	na	12.2
Pacific			
California	3.1	na	0.8
Men's & Boys' separate dress & sport trousers			
U.S. Total	1,308.3	1,388.1	100.0
New England			
Massachusetts	22.0	na	1.6
Middle Atlantic			
New York	167.6	180.8	12.8
New Jersey	10.8	na	0.8
Pennsylvania	63.0	na	4.8
North Central			
Ohio	21.6	40.2	1.7
Missouri	16.6	na	1.3
South Atlantic			
Maryland	28.2	40.8	2.2
Virginia	36.4	19.0	2.8
Georgia	50.8	122.4	3.9

(continued)

SHIPMENTS

By Leading States

Value of Shipments of Men's Tailored Wear by All Producers by Leading States, 1972, 1977

(Millions of Dollars)
(continued)

	1977	1972	% of Total* 1977
Men's & Boys' separate dress & sport trousers (continued)			
South Central			
Kentucky	$ 13.9	$ 18.7	1.1%
Tennessee	98.3	155.0	7.5
Alabama	38.1	18.4	2.9
Mississippi	78.7	145.7	6.0
Louisiana	29.5	na	2.3
Texas	246.7	273.0	18.8
Pacific			
California	42.9	42.2	3.3
Contract work on men's & boys' separate trousers			
U.S. Total	264.5	355.0	100.0
Middle Atlantic			
New York	8.9	7.4	3.4
Pennsylvania	38.9	33.7	14.7
North Central			
Missouri	15.9	na	6.0
South Atlantic			
Virginia	9.6	12.9	3.6
Georgia	51.0	59.5	19.3
South Central			
Kentucky	12.1	11.4	4.6
Tennessee	17.8	17.0	6.7
Alabama	38.7	18.9	14.6
Mississippi	21.8	39.4	8.2
Arkansas	8.0	na	3.0
Louisiana	12.3	na	4.7
Texas	8.9	61.2	3.4
Pacific			
California	3.2	1.9	1.2

na = not available
*Percent distribution does not equal 100.0% due to disclosures. States with disclosures are not shown.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC-1-23A.

PRODUCER PRICE TRENDS

The largest jump in the price indexes covering men's tailored wear was reported for the dress trousers. Prices rose 7.7% over the period February to July 1980 (latest months available). Increases, for the entire year of 3.8% and 3.4% were registered in regular weight suits and tailored sports jackets, respectively, while light weight suits showed no change.

Producer Price Indexes of Selected Types of
Men's & Boys' Tailored Wear, 1978—1980

	1980(p)	1979	1978	% Change 1980/1979	% Change 1980/1978
Apparel 1967 = 100	172.2	160.4	152.4	+ 7.4%	+13.0%
Men's Wear 1967 = 100	200.2	186.0	176.1	+ 7.6	+13.7
Suits, reg. wt. 12/77=100	114.6	110.4	105.4	+ 3.8	+ 8.7
Suits, lght. wt. 12/77=100	113.3	113.3	107.4	nc	+ 5.5
Dress trousers 12/77=100	118.0*	109.6	104.0	+ 7.7	+13.5
Tailored sport jackets, 12/77=100	117.9	114.0	108.0	+ 3.4	+ 9.2

*February—July 1980 average
nc = no change
(p) = preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports

According to the U.S. Bureau of Industrial Economics, imports represented 12.4% of U.S. consumption of men's and boys' suits and coats in 1980, and 31.4% of separate trouser consumption.

The U.S. imported $807.2 million worth of men's and boys' tailored clothing and rainwear in 1980 as opposed to $764.4 million in 1979, a gain of 5.6%. Both figures are C.I.F. values (see footnotes on the following table), as recorded by the Census Bureau. On a quantity measurement, imports of tailored clothing and rainwear were almost 9,200 thousand dozen. This represents an increase of 10.4% over the 8,328 thousand dozen imported into the U.S. in 1979.

U.S. imports of coats, except suit-type, rose 30.0% in value ($204.5 million) in 1980 versus 1979. Cotton coats, except suit-type, accounted for most of this increase with a 44.7% gain in import value of $61.2 million versus the 1979 value of $42.8 million.

Imported trousers of all types rose overall 20.4% in value, spurred by a 25.9% rise in the value of imported cotton trousers.

Several categories of imported men's and boys' tailored clothing and rainwear declined in quantity and value in 1980 as compared to 1979. Suit-type sport coats and jackets fell 14.9% in value, the largest decline of any category. Men's and boys' rainwear and suits both experienced declines in value in 1980 of slightly over 11%.

(continued)

FOREIGN TRADE

Imports

The Far East remains the major exporter of men's and boys' tailored clothing to the U.S., Hong Kong, Korea, Taiwan and Mainland China are the top four countries of origin. These four countries, with $431.4 thousand worth of exports to the U.S., represented over 53% of U.S. imports.

Although imports' share of the men's tailored wear market is small compared with shares in other major apparel markets, domestic producers consider themselves vulnerable to import penetration from low-cost foreign suppliers, owing to the high labor content in their products. Between 2½ and 3 hours of direct labor is required to produce a tailored suit. As a result, industry observers estimate as much as a $15 difference in labor costs between U.S. made suits and those made in low-wage, developing countries. Some of the large U.S. clothing manufacturers have installed labor-saving machines which partially automate certain cutting, sewing and pressing operations to combat this problem. While such equipment improves those manufacturers' competitive position compared with other U.S. or developed country producers, the labor cost advantage of the developing countries is still projected to remain large.

Summary of U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear, 1979, 1980

	Quantity (Thous. of Doz.) 1980	Quantity (Thous. of Doz.) 1979	% Change 1980/1979	Value (S.I.F.)* (Millions of $) 1980	Value (S.I.F.)* (Millions of $) 1979	% Change 1980/1979
Total, reported categories	9,198.0	8,328.4	+ 10.4%	807.2	764.4	+ 5.6%
Suits, total	190.6	252.8	- 24.6	106.7	120.0	- 11.1
Wool	111.9	128.1	- 12.6	81.3	85.9	- 5.4
Man-made	78.7	124.7	- 36.9	25.4	34.1	- 25.5
Suit-type sport coats & jackets, total	255.7	398.7	- 35.9	79.2	93.1	- 14.9
Wool	52.9	70.7	- 25.2	27.0	31.9	- 15.4
Cotton	184.9	203.6	- 9.2	33.6	37.3	- 9.9
Man-made	95.9	124.4	- 22.9	18.6	23.9	- 22.2
Trousers**, total	6,613.6	6,037.1	+ 9.5	407.3	383.3	+ 6.3
Wool	160.6	170.5	- 5.8	31.1	30.9	+ 0.6
Cotton	4,821.0	4,484.2	+ 7.5	303.5	241.1	+ 25.9
Man-made	1,632.0	1,382.4	+ 18.1	72.7	66.3	+ 9.7
Coats, excl. suit-type, total	2,110.7	1,607.1	+ 31.3	204.5	152.3	+ 34.3
Wool	21.6	32.5	- 33.5	10.3	15.9	- 35.2
Cotton	711.0	491.5	+ 44.7	61.2	42.8	+ 43.0
Man-made	1,378.1	1,083.1	+ 27.2	133.0	98.6	+ 34.9
Raincoats	27.4	32.7	- 16.2	9.5	10.7	- 11.2

(footnotes continued)

FOREIGN TRADE

Imports

*The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

**This category also includes slacks and shorts made from these fibers.

Source: U.S. Bureau of the Census,
U.S. General Imports,
Report FT135, December 1979, 1980.

U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear by Leading Countries of Origin, 1979, 1980

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Suits, wool, total	111.9	128.1	- 12.6%	81.3	85.9	- 5.4%
France	29.0	32.2	- 9.9	22.7	23.4	- 3.0
Korea	28.3	24.9	+ 13.7	16.1	14.0	+ 15.0
Poland	13.9	14.3	- 2.8	5.4	5.4	nc
Italy	9.1	11.2	- 18.8	13.8	13.5	+ 2.2
Suits, man-made, total	78.7	124.7	- 36.9	25.4	34.1	- 25.5
Korea	46.0	33.7	+ 36.5	17.5	13.5	+ 29.6
Taiwan	17.3	50.3	- 65.6	2.7	8.6	- 68.6
Romania	6.2	11.7	- 47.0	1.4	2.3	- 39.1
Philippines	2.8	13.3	- 78.9	0.8	3.7	- 78.3
Suit-type sport coats & jackets, wool, total	52.9	70.7	- 25.2	27.0	31.9	- 15.4
Korea	12.0	12.6	- 4.7	4.8	4.6	+ 4.3
France	10.1	15.4	- 34.4	5.7	7.9	- 27.8
Poland	5.9	5.1	+ 15.7	1.3	1.1	+ 18.2
Italy	5.4	6.9	- 21.7	6.0	6.1	- 1.6
Suit-type sport coats & jackets, cotton, total	184.9	203.6	- 9.2	33.6	37.3	- 9.9
Poland	38.1	45.2	- 15.7	6.9	8.0	- 13.8
Taiwan	23.9	9.3	+157.0	4.7	1.7	+176.5
Mainland China	23.7	5.1	+364.7	2.7	0.4	+575.0
Hong Kong	23.1	32.6	- 29.1	3.8	5.5	- 30.9

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear by Leading Countries of Origin, 1979, 1980
(continued)

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Suit-type sport coats & jackets, man-made, total	95.9	124.4	- 22.9%	18.6	23.9	- 22.2%
Korea	29.3	52.0	- 43.7	6.2	11.9	- 47.9
Columbia	24.2	21.7	+ 11.5	4.4	3.7	+ 18.9
Mexico	17.4	16.0	+ 8.8	3.9	3.5	+ 11.4
Dominican Republic	7.2	nr	na	0.5	nr	na
Trousers, wool, total#	160.6	170.5	- 5.8	31.1	30.9	+ 0.6
Korea	56.7	74.6	- 24.0	8.1	10.0	- 19.0
Italy	27.0	28.2	- 4.2	9.8	8.5	+ 15.3
Hong Kong	18.7	14.6	+ 28.1	3.5	2.7	+ 29.6
Mainland China	16.5	nr	na	1.6	nr	na
Trousers, cotton, total#	4,821.0	4,484.2	+ 7.5	303.5	241.1	+ 25.9
Hong Kong	2,240.8	1,983.4	+ 13.0	163.3	124.9	+ 30.7
Mainland China	696.0	875.2	- 20.5	24.2	24.4	- 0.8
Singapore	372.6	331.3	+ 12.5	22.0	18.0	+ 22.2
Taiwan	302.1	317.2	- 4.7	19.1	16.9	+ 13.0
Trousers, man-made, total#	1,632.0	1,382.4	+ 18.1	72.7	66.3	+ 9.7
Taiwan	809.7	574.5	+ 40.9	32.8	25.6	+ 28.1
Mexico	462.1	388.3	+ 19.0	19.1	14.8	+ 29.1
Korea	104.3	198.9	- 47.6	7.3	14.1	- 48.2
Hong Kong	57.3	67.2	- 14.7	4.0	4.4	- 9.1
Coats, excl. suit-type, wool, total	21.6	32.5	- 33.5	10.3	15.9	- 35.2
Yugoslavia	5.6	3.9	+ 43.6	1.6	2.3	- 30.4
United Kingdom	2.5	4.1	- 39.0	1.9	3.7	- 48.6
Hong Kong	2.4	4.4	- 45.5	0.8	1.2	- 33.3
Italy	2.0	3.3	- 39.3	2.2	2.9	- 24.1
Coats, excl. suit-type, cotton, total	711.0	491.5	+ 44.7	61.2	42.8	+ 43.0
Sri Lanka	155.5	48.8	+218.6	9.1	2.2	+313.6
Mainland China	118.4	37.5	+215.7	6.4	2.2	+190.9
Hong Kong	100.1	61.5	+ 62.8	13.1	8.7	+ 50.6
Macao	91.6	74.9	+ 22.3	7.0	5.5	+ 27.3

(continued)

Imports

U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear by Leading Countries of Origin, 1979, 1980
(continued)

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Coats, excl. suit-type, man-made, total	1,378.1	1,083.1	+ 27.2%	133.0	98.6	+ 34.9%
Korea	602.6	372.0	+ 62.0	64.0	42.8	+ 49.5
Taiwan	268.0	147.1	+ 82.2	27.1	15.2	+ 78.3
Hong Kong	123.6	130.6	- 5.4	15.2	14.9	+ 2.0
Mexico	109.5	72.9	+ 50.2	9.8	6.9	+ 42.0
Raincoats, total	27.4	32.7	- 16.2	9.5	10.7	- 11.2
Poland	8.1	7.0	+ 15.7	2.8	2.4	+ 16.6
Hong Kong	7.1	3.7	+ 91.9	1.5	0.9	+ 66.7
Yugoslavia	1.8	2.2	- 18.2	0.2	0.9	- 77.8
Thailand	1.7	3.0	- 43.3	0.4	0.7	- 42.9

*The C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

#This category also includes slacks and shorts made from these fibers.

nr = not reported
na = not available

Source: U.S. Bureau of the Census,
U.S. General Imports,
Report FT 135, December 1979, 1980.

Exports

In 1980, the U.S. exported over 3.6 million dozen of men's and boys' tailored apparel and rainwear valued at over $97 million. This was an astounding 115.0% increase over the previous years 1.7 million dozen, valued at $82.7 million. Clothing of man-made material accounted for most of this increase with a 425.1% gain in unit volume, to 2.2 million dozen versus 416 thousand dozen in 1979. This category, which accounted for 24.8% of exports in 1979 grew to 60.5% in 1980.

By far the largest category exported in 1980 in the tailored clothing sector was trousers and slacks. This group accounted for 68.7% of the unit volume of tailored clothing exports, while representing 60.3% of exports in terms of value.

(continued)

FOREIGN TRADE

Exports

The largest gain in terms of volume in 1980 was registered by the knit wool suits, coats, raincoats, jackets, trousers and shirts group, which climbed 274% to 28.8 thousand dozen. A close second was coats and jackets, except suit-type, including rainwear, which captured a 263.3% gain. No overall category registered a decline in either units or value during 1980.

Summary of U.S. Exports of Men's & Boys' Tailored Clothing & Rainwear 1979, 1980

	Quantity (Thous. of Doz.)		% Change	Value (F.A.S.)* (Thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Total, all reported categories	3,608.3	1,678.2	+115.0%	$97,011	$82,749	+ 17.2%
Wool	66.6	40.6	+ 64.0	5,349	3,761	+ 42.2
Cotton	1,357.3	1,221.6	+ 11.1	47,378	52,785	- 10.2
Man-made	2,184.4	416.0	+425.1	44,284	26,203	+ 69.0
Suits, total	42.8	28.1	+ 52.3	3,561	2,404	+ 48.1
Knit:						
Cotton	12.4	10.4	+ 19.2	866	594	+ 45.8
Man-made	4.0	3.1	+ 29.0	480	522	- 8.0
Not knit:						
Wool	1.2	0.5	+140.0	170	119	+ 42.9
Cotton	13.7	10.9	+ 24.7	772	582	+ 32.6
Man-made	11.5	3.2	+259.4	1,273	587	+116.9
Suit-type sport coats & jackets, total	177.3	112.5	+ 57.6	11,726	9,952	+ 17.8
Knit:						
Cotton	48.0	33.7	+ 42.4	2,130	1,766	+ 20.6
Man-made	38.1	12.3	+209.8	1,491	1,792	- 16.8
Not knit:						
Wool	4.6	12.9	- 64.3	984	1,088	- 9.6
Cotton	13.7	19.3	- 29.0	1,512	2,052	- 26.3
Man-made	72.9	34.3	+112.5	5,609	3,254	+ 72.4
Trousers & slacks, total	2,477.6	1,287.4	+ 92.4	58,546	54,240	+ 7.9
Knit:						
Cotton	143.8	93.8	+ 53.3	6,247	4,577	+ 36.5
Man-made	358.2	57.8	+519.7	3,667	2,918	+ 25.7
Not knit:						
Wool	21.8	16.5	+ 32.1	599	750	- 20.1
Cotton	965.7	924.2	+ 4.5	29,015	36,988	- 21.6
Man-made	988.1	195.1	+406.5	19,018	9,007	+111.1

(continued)

FOREIGN TRADE

Exports

Summary of U.S. Exports of Men's & Boys' Tailored Clothing & Rainwear 1979, 1980
(continued)

	Quantity (Thous. of Doz.)		% Change	Value (F.A.S.)* (Thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Coats & jackets, excl. suit-type, incl. rainwear, total	881.8	242.5	+263.6%	$20,850	$14,881	+ 40.1%
Knit:						
Cotton	116.9	105.8	+ 10.5	3,196	3,913	- 18.3
Man-made	368.9	38.7	+853.2	5,599	3,202	- 74.9
Not knit:						
Wool	10.2	3.0	+240.0	1,268	532	+138.3
Cotton	43.1	23.5	+ 83.4	3,640	2,313	+ 57.4
Man-made	342.7	71.5	+379.4	7,147	4,921	+ 45.1
Wool suits, coats, raincoats, jackets, trousers & shirts—knit, total	28.8	7.7	+274.0	2,328	1,272	+ 83.0

*The value is generally equivalent to a F.A.S. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports-Schedule E
Commodity by Country FT410,
December 1979, 1980.

AT THE RETAIL LEVEL

THE MARKET FOR MEN'S WEAR

Male Population

Between 1980 and 1985, the Census Bureau projects an increase of 16.8% in the number of males aged 35-49 years in the U.S. By the year 2000, it is expected that this age group will be 64.6% larger than in 1980 and represent 23.3% of the total male population. Older age groups (50-64 years, 65 years and over) are also expected to increase significantly in numbers during these years.

As shown in the table charting male employment, the U.S. is becoming more and more a nation of white collar workers. While the total number of employed males declined by 0.5% between 1978 and 1980, the percentage of men employed in white collar occupations fared better, rising 3.8% between the same years. Those employed in blue collar jobs slipped on a percentage basis, down 5.4% to 43.6% of the males employed.

(continued)

THE MARKET FOR MEN'S WEAR

Male Population

These statistics show more American males entering their prime earning years, and entering occupations where their earnings will be at a peak. This is good news for manufacturers of men's tailored wear because the corresponding increase in personal disposable income for these males could surely spurt sales of these items upwards.

Male Population of the U.S., 1980 & Projections* to 2000
(Thousands of Males)

					Percent of male Population		
	1980	1985	2000	% Change 2000/1980	1980	1985	2000
Total, all ages	110,032	113,366	126,558	+ 15.0%	100.0%	100.0%	100.0%
Under 15 years	26,215	26,426	29,191	+ 11.4	23.8	23.3	23.1
15 years & over	83,817	86,940	97,367	+ 16.2	76.2	76.7	76.9
15-19 years	10,752	9,150	10,069	- 6.4	9.8	8.1	8.0
20-34 years	29,039	30,142	25,662	- 11.6	24.4	26.6	20.3
35-49 years	17,954	20,976	29,556	+ 64.6	16.3	18.5	23.3
50-64 years	15,770	15,659	19,364	+ 22.8	14.3	13.8	15.3
65 years & over	10,302	11,013	12,716	+ 23.4	9.4	9.7	10.0
Median age in years	28.8	30.3	34.1				

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, Nos. 714 (July 1977)
1980 Census of Population
PC80-S1-11, May 1981.

Employment

Male Employment by Occupational Group, 1978, 1979, 1980
(Males 16 Years of Age & Older)

	1980	1979	1978	% Change 1980/1978*
Total males employed, (in thousands)	54,764	55,318	55,032	- 0.5%
		% of Total		
White collar workers	43.8	42.7	42.0	+ 3.8
Professional & technical	16.1	15.7	15.7	+ 2.0
Managers & administrators	15.1	14.5	14.1	+ 6.6
Sales workers	6.2	6.1	6.0	+ 2.2
Clerical	6.4	6.4	6.2	+ 3.5
Blue collar workers	43.6	44.8	45.9	- 5.4
Craft & kindred workers	20.6	21.0	21.4	- 4.4
Operatives	11.3	11.3	11.8	- 4.4
Nonfarm laborers	6.2	6.7	6.8	- 8.5
Service workers	9.0	8.9	8.3	- 5.4
Farm workers	3.6	3.6	3.6	- 2.0

*Percentage change is based on the actual number of workers in each category.

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

Employment by State

Employment of Males (Age 20 & Over) by Occupation, by State, 1979
(Numbers in Thousands)

	Total Male Population	Male Employment	White Collar Employment	% of total White Collar Employment
U.S. Total	68,404	52,311	21,594	100.0%
Alabama	1,145	853	276	1.3
Alaska	113	86	40	0.2
Arizona	745	536	247	1.1
Arkansas	657	436	146	0.7
California	7,132	5,497	2,622	12.1
Colorado	855	699	333	1.5
Connecticut	990	779	368	1.7
Delaware	182	133	63	0.2
District of Columbia	262	146	82	0.4
Florida	2,831	1,905	813	3.7
Georgia	1,499	1,170	484	2.2
Hawaii	263	194	82	0.4

(continued)

Employment by State

Employment of Males (Age 20 & Over) by Occupation, by State, 1979
(Numbers in Thousands)
(continued)

	Total Male Population	Male Employment	White Collar Employment	% of total White Collar Employment
Idaho	280	224	84	0.4%
Illinois	3,491	2,727	1,145	5.3
Indiana	1,668	1,314	409	1.9
Iowa	923	742	242	1.1
Kansas	760	612	238	1.1
Kentucky	1,087	821	273	1.3
Louisiana	1,177	893	338	1.6
Maine	344	242	89	0.4
Maryland	1,296	1,050	512	2.4
Massachusetts	1,829	1,418	656	3.0
Michigan	2,859	2,155	784	3.6
Minnesota	1,303	1,042	429	2.0
Mississippi	695	497	173	0.8
Missouri	1,540	1,167	487	2.3
Montana	247	192	66	0.3
Nebraska	488	388	141	0.7
Nevada	232	189	67	0.3
New Hampshire	284	232	102	0.5
New Jersey	2,301	1,764	829	3.8
New Mexico	364	274	122	0.6
New York	5,465	4,035	1,909	8.8
North Carolina	1,689	1,339	476	2.2
North Dakota	201	157	56	0.3
Ohio	3,351	2,613	990	4.6
Oklahoma	899	672	291	1.3
Oregon	838	636	260	1.2
Pennsylvania	3,742	2,735	1,067	4.9
Rhode Island	300	219	95	0.4
South Carolina	863	660	241	1.1
South Dakota	212	171	56	0.3
Tennessee	1,347	1,013	359	1.7
Texas	4,077	3,291	1,336	6.2
Utah	380	302	133	0.6
Vermont	157	121	47	0.2
Virginia	1,565	1,245	554	2.6
Washington	1,251	966	404	1.9
West Virginia	596	411	115	0.5
Wisconsin	1,485	1,192	422	2.0
Wyoming	144	123	41	0.2

Source: U.S. Bureau of Labor Statistics, Geographic Profile of Employment & Unemployment, 1979 (Report 619), December 1980.

RETAIL SALES

The men's tailored clothing classification encompasses a variety of products, including suits, sport jackets, separate vests, topcoats, etc., which are sold in a variety of retail outlets. This diversity, plus the fact that items, such as "trios" (separate jackets, vests and pants) may be classified as suits rather than separates make it difficult to report accurately an estimate of the value of the men's tailored wear industry by type of product.

Men's suit sales declined by 12% in 1980 according to data published in Chain Store Age (January 1981) while sport jackets fell 10% and men's and boys' slacks were up 3%. Estimates for 1981 from the same source indicate a rise of 3% in sport jacket sales, a 5% rise in men's and boys' slacks and suit sales to continue their decline by registering a 2% fall.

The total retail market for suits and sport coats in 1979 was estimated at $3.7 billion, according to Chain Store Age, General Merchandise Edition (November 1980). This estimate is the result of consumer research conducted by Market Research Corporation of America (MRCA) which monthly monitors 7,500 households for a representative cross-section of nationwide purchases.

Suits and sport coats dominated the reported men's wear business, exceeding spending for casual pants and jeans, the second largest category, by over $1 billion.

Spending For Tailored Wear Compared With Other Types of Men's Wear, 1979

	Mil. Units	Value (Bil. $)
Suits & sport coats	44.6	$ 3.7
Slacks & shorts	127.9	1.7
Casual pants & jeans	216.9	2.6
Outerwear	55.8	1.6
Dress shirts	160.2	1.5
Sport shirts, tops	244.0	1.9
Pj's & robes	39.9	.4
Underwear	589.5	1.1
Socks	622.0	0.7
Sweaters & bathing suits	87.8	1.2

Source: Market Research Corp. of America,
Chain Store Age (November 1980).

The MRCA data indicated that 22.5% of total spending for men's wear in 1979 (projected to $16.5 billion) was accounted for by men's suits and sport coats. Slacks and shorts accounted for 10.5%.

The latest official data, reported by the U.S. Census Bureau, on merchandise line sales is from the 1977 census of retail trade. Merchandise line data was reported only by stores with payrolls, and not all store types gave breakdowns in men's wear sales by type. However, reported sales on men's suits, tailored jackets and slacks amounted to $4.3 billion in 1977; overcoats and topcoats, $603.9 million; rainwear and outerwear, $853.1 billion.

(continued)

RETAIL SALES

Sales of these tailored wear and rainwear categories came to a total of over $5.8 billion (out of a total for all men's and boys' wear, not including footwear, amounting to $22.7 billion).

The sales share held in various types of tailored wear and rainwear by the store types reporting on these categories is covered in the following table. Men's wear stores accounted for over half of the volume in men's suits, tailored jackets and slacks. Department stores held the largest share of overcoat sales and of rainwear business.

By Store Type

Retail Sales of Specified Men's Tailored Wear Categories By Type
Of Retail Outlets Reporting for 1977
(includes only stores with payroll)

	Stores		Sales	
	No.	%	Mil. $	%
Men's suits, tailored jackets, slacks, total*	38,060	100.0%	$4,344.4	100.0%
Department stores	7,337	19.3	1,413.9	32.5
Men's wear stores	15,499	40.7	2,267.8	52.2
Family clothing stores	10,509	27.6	522.8	12.0
Women's ready-to-wear stores	965	2.5	62.9	1.5
Shoe stores:				
Men's	35	0.1	0.3	#
Family	110	0.3	1.8	#
Non-store retailers:				
Mail order houses	3,605	9.5	74.9	1.7
Men's overcoats, topcoats, total*	21,711	100.0%	$ 603.9	100.0%
Department stores	4,568	21.0	293.1	48.5
Men's wear stores	8,931	41.1	205.1	34.0
Family clothing stores	5,797	26.7	88.5	14.6
Non-store retailers:				
Mail order houses	2,415	11.1	17.3	2.9
Men's rainwear, outerwear, total*	30,112	100.0%	$ 853.1	100.0%
Department stores	6,235	20.7	341.7	40.0
Men's wear stores	12,854	42.7	333.1	39.1
Family clothing stores	7,353	24.4	117.1	13.7
Shoe stores: Men's	106	0.4	0.4	0.1
Non-store retailers:				
Mail order houses	3,564	11.8	60.8	7.1

*Total is based only on stores which reported sales of the specific merchandise category. Not all types of stores broke out sales in this detail. However, the above reflects sales in the major outlet types.

Source: U.S. Bureau of the Census,
Census of Retail Trade 1977.

By Store Type

Contribution of Men's Tailored Wear & Rainwear Sales To Total Men's & Boys' Wear in Department Stores, Men's Wear Stores & Family Clothing Stores, 1977

(Includes only stores with payroll)

	Department Stores	Men's & Boys' Wear Stores	Family Clothing Stores
Total Store Sales (millions of $)	$76,909.4	$6,838.8	$7,883.6
Men's & boys' wear (except footwear) sales, total	10,574.9	6,275.4	3,001.5
Percent	100.0%	100.0%	100.0%
Types of men's wear:			
Suits & formal wear	13.4	36.1	17.4
Rainwear & outerwear	3.2	5.3	3.9
Overcoats & topcoats	2.8	3.3	2.9
Other men's & boys' wear	80.6	56.3	75.8

Source: Based on U.S. Bureau of the Census, Census of Retail Trade, 1977.

By Store Type: Department Stores

The number of firms operating department stores declined to 600 in 1977, according to the Census of Retail Trade, from a total of 866 counted in the 1972 census, representing a drop of 30.7%. The number of stores operated by these firms (which include such operations as Federated, Allied Stores, Associated Dry Goods, etc.) increased 13.7%, from 7,742 department stores counted in 1972 to 8,807 in 1977. Department store sales were up 50.5% in this period, according to the Census Bureau, reaching $77 billion in 1977 compared with $51.1 billion in 1972.

Department store business has become much more concentrated among the big firms. In 1977, firms with annual sales of $100 million or more (numbering 79) operated 83% of the department stores and accounted for close to 92% of department stores' total sales volume.

In 1972, department store firms with sales of $100 million and up (66 firms) operated 73.2% of the department store units and accounted for 73.8% of all department stores in business in 1977 and controlled 86.5% of department store sales. In 1972, the 50 largest firms operated 67.4% of the department stores and controlled 82% of total department store business in that year.

(continued)

RETAIL SALES

By Store Type: Department Stores

Department Stores, 1977/1972 (SIC 531*)

	Firms		Stores**		Sales	
	No.	%	No.	%	Thous.$	%
Year 1977						
All firms	600	100.0%	8,807	100.0%	$76,909,452	100.0%
With annual sales of—						
$100 mil. or more	79	13.2	7,311	83.0	70,605,243	91.8
$ 50 mil.—$99.9 mil.	32	5.3	453	5.1	2,268,387	2.9
Under $50 mil.	489	81.5	1,043	11.8	4,035,822	5.2
Year 1972						
All firms	866	100.0%	7,742	100.0%	$51,083,522	100.0%
With annual sales of—						
$100 mil. or more	66	7.6	5,664	73.2	44,023,994	86.2
$ 50 mil.—$99.9 mil.	31	3.6	564	7.3	2,210,309	4.3
Under $50 mil.	769	88.8	1,514	19.5	4,849,219	9.5

*Includes discount department stores and department store outlets of mail order chains, as well as traditional department stores, under the Standard Industrial Classification system.

**Each business location is counted as a separate store. Each branch store of a multi-unit department store organization is separately counted, as well as individually classified by store type based on merchandise mix and size.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

Stores classified as department stores accounted for 8.3% of the stores reporting sales of men's and boys' wear in 1977 and 46.5% of total sales in this category—compared with 40.9% in 1972.

Over 48% of all men's overcoats/topcoats sales were consumated in department stores while 40.0% of rainwear/outerwear and 32.5% of men's suits, tailored jackets and slacks sales were transacted in these same stores during 1977. Department stores were the prime outlets for overcoats/topcoats and rainwear/outerwear sales during that same year, according to the U.S. Bureau of the Census.

Merchandise operating results, compiled by the National Retail Merchants Association, show that among department stores with total sales volume of over $1 million in 1979, the typical store registered declines of 5.1% and 3.0% in sales of suits and formal wear and overcoats, topcoats, rain, storm and dual purpose coats, respectively, versus 1978. Men's clothing, as an entire group, showed a 2.9% gain for the year while the all adult male apparel category showed a 5.6% rise.

RETAIL SALES

By Store Type: Department Stores

Men's Departmental Merchandising & Operating Results in Department Stores with Total Annual Sales Over $1 Million, 1979

Typical (median) Results

	All Adult Male Apparel	Men's Clothing	Overcoats, Topcoats Rain, Storm & Dual Purpose Coats	Suits & Formal Wear
Net sales, % change from last year	+ 5.6%	+ 2.9%	- 3.0%	- 5.1%
Sales, % of merchandise division	100.0	39.1	7.0	9.1
Sales, % of total store sales	9.0	3.8	0.6	0.9
$ sales per square foot of selling space	$130.5	$121.0	na	$133.0
Cumulative markon, %	49.9%	50.2%	49.3%	49.4%
Gross margin, % of sales including cash discounts	42.3	38.3	42.8	29.5
Markdowns, retail, % of sales	12.6	17.6	12.3	24.3
Returns, % of sales	7.8	9.5	na	9.4
Number of stock turns	2.7	2.2	3.2	1.7
Salespeople's salaries, % of sales	7.1	7.4	7.2	7.8
Sales promotions, % of sales	2.9	3.4	3.2	4.5

na = not available

Source: National Retail Merchants Association, "Merchandising & Operating Results," 1979 Edition.

By Store Type: Men's Wear Stores

There has been increasing concentration of men's and boys' wear store business among large firms in recent years, according to the U.S. Bureau of the Census, and this trend is continuing.

The total number of firms operating men's and boys' wear stores dropped from 18,310 when the complete census of retail trade was conducted covering 1972 to 16,908 counted in the 1977 census (a decline of 7.6%). The number of men's and boys' wear stores operated by these firms dropped 2.0% in this same period—from 23,158 in 1972 to 22,683. In the same period, the share of total men's and boys' wear sales done by these stores dropped from 32.8% in 1972 to 27.6% in 1977.

Men's and boys' wear retailer firms with sales of $1 million or more increased from 608 in 1972 to 934 in 1977, for a gain of 53.6%. These large firms represented 5.5% of the total men's and boys' wear retailer firms in 1977 compared with 3.4% in 1972. The million dollar-and-over firms operated 5,595 men's and boys' wear stores in 1977 (24.7% of the total). In 1972 they operated 3,918 stores (16.9% of the total).

The 934 firms with sales of $1 million or more (5.5% of all firms) accounted for close to 50% of all men's and boys' wear specialty store volume in 1977. This compares with their 42% share in 1972.

RETAIL SALES

By Store Type: Men's Wear Stores

Men's & Boys' Wear Stores, 1977/1972 (SIC 561*)

1977	Firms No.	Firms %	Stores No.	Stores %	Sales Mil. $	Sales %
All firms	16,908	100.0%	22,683	100.0%	$6,943.2	100.0%
With annual sales—						
$1 mil. or more	934	5.5	5,595	24.7	3,395.1	48.9
$100 mil. or more	3	**	557	2.5	(300.0)	4.3
10 mil.-$99.9 mil.	36	0.2	1,986	8.8	1,080.9	15.6
5 mil.-$9.9 mil.	66	0.4	684	3.0	444.3	6.4
1 mil.-$4.9 mil.	829	4.9	2,368	10.4	1,569.9	22.6
$500,000 to $0.9 mil.	1,484	8.8	2,172	9.6	1,031.8	14.9
Less than $500,000	14,490	8.6	14,916	65.7	(2,516.3)	36.2

1972	Firms No.	Firms %	Stores No.	Stores %	Sales Mil. $	Sales %
All firms	18,310	100.0%	23,158	100.0%	$5,584.3	100.0%
With annual sales—						
$1 mil. or more	608	3.4	3,918	16.9	2,323.8	41.6
$100 mil. or more	2	**	498	2.1	(200.0)	3.6
10 mil.-$99.9 mil.	23	0.1	1,261	5.4	(927.1)	16.6
5 mil.-$9.9 mil.	23	0.1	235	1.0	165.0	2.9
1 mil.-$4.9 mil.	560	3.1	1,924	8.3	1,031.7	18.5
$500,000 to $0.9 mil.	1,180	6.4	1,854	8.0	831.4	14.9
Less than $500,000	16,522	90.2	17,386	75.1	2,429.1	43.5

*Establishments primarily engaged in the retail sales of men's and boys' ready-to wear clothing and furnishings.

**Less than 0.1%

Note: Figures in parenthesis represent estimates, as the Census Bureau withheld sales figures for these groups to avoid disclosure of individual operations. Volume of the three firms with sales of $100 million or more in 1977 has been conservatively estimated at $300 million, but is probably higher. This would mean that the 934 firms who have sales of $1 million or more probably control more than 48.9% of sales.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

Men's & boys' wear stores accounted for about 28% of total reported sales of men's and boys' wear in all retail outlets with payroll in 1977 compared with 32.8% in 1972. As previously noted, among store types reporting separately on tailored wear sales in the 1977 Census, men's wear stores accounted for 52.2% of suit, tailored jacket and slack sales, 34% of sales of men's overcoats and topcoats. In men's rainwear, 39.1% of reported sales were in men's wear stores.

RETAIL SALES

By Store Type: Men's Wear Stores

According to the Menswear Retailers of America, men's clothing sales in men's wear specialty stores decreased by 3.1% in 1980 over 1979. This decrease was led by men's suits which recorded a sales loss of 8.7% followed by the 2.3% loss in men's coats. Men's sport coats and dress slacks bucked the trend toward lower sales by registering 7.6% and 2.7% increases, respectively.

Percent of Men's Wear Store Sales Accounted For
By Men's Tailored Clothing, 1979, 1980
(Median Results)

	All Firms		Firms Handling Men's Wear Only		Firms Handling Women's Wear	
	1980 (83 firms)	1979 (102 firms)	1980 (42 firms)	1979 (61 firms)	1980 (41 firms)	1979 (41 firms)
Total store sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Men's tailored wear	44.3	43.0	46.3	48.5	32.5	32.5
Men's suits	21.0	22.3	22.6	26.1	16.4	17.2
Sport coats	9.8	9.0	11.1	9.1	9.4	8.0
Dress slacks	8.6	8.1	9.1	8.7	7.4	6.5
Men's coats	2.7	2.8	3.3	3.1	2.3	2.3
Total men's clothing department sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Men's suits	47.8	52.2	48.3	54.4	47.4	50.5
Sport coats	25.1	22.4	23.9	20.1	28.3	25.6
Dress slacks	20.0	18.1	22.5	17.4	19.0	18.3
Men's coats	6.6	6.4	6.6	6.4	6.7	6.6

Source: Menswear Retailers of America,
Annual Business Survey,
June 1980, June 1981.

Family Clothing Stores

The 826 firms operating family clothing stores—which sell apparel for men, boys, women and children—in the U.S. in 1977, which had sales of $1 million or more, represented 5.2% of all firms in this classification. These large firms operated a total of 5,717 family clothing stores which accounted for 72.8% of total family clothing store business in 1977.

Comparable figures for 1972 are not available. However, family clothing store firms with a volume of $500,000 or more in 1977 operated a third of all family clothing stores and accounted for 81.2% of total family clothing store business. In 1972 firms of this size operated 26% of the stores which did 72.3% of total family clothing store business that year.

(continued)

Family Clothing Stores

Family Clothing Stores, 1977/1972 (SIC 565*)

	Firms		Stores		Sales	
	No.	%	No.	%	Mil. $	%
Year 1977						
All firms	15,873	100.0%	21,556	100.0%	$8,054.7	100.0%
With annual sales—						
$1 million or more	826	5.2	5,717	26.5	5,867.6	72.9
$100 mil. or more	8	**	1,959	9.1	2,358.0	29.3
$ 10 mil.-$99.9 mil. $ 5 mil.-$9.9 mil.	143	0.9	1,956	9.1	2,191.9	27.2
$ 1 mil.-$4.9 mil.	675	4.2	1,802	8.4	1,317.7	16.4
$500,000-$0.9 mil.	963	6.1	1,360	6.3	673.7	8.4
Less than $500,000	14,084	88.7	14,479	67.2	1,513.4	18.7
Year 1972						
All firms	14,032	100.0%	18,224	100.0%	$4,926.8	100.0%
With annual sales—						
$100 mil. or more	3	**	982	5.4	(D)	--
$ 10 mil.-$99.9 mil.	37	0.3	1,046	5.7	(D)	--
$ 5 mil.-$9.9 mil.	42	0.3	400	2.2	294.3	6.0
$ 1 mil.-$4.9 mil.	428	3.0	1,260	6.9	884.8	18.0
$500,000-$0.9 mil.	696	5.0	1,055	5.8	(D)	--
Less than $500,000	12,826	91.4	13,481	74.0	1,366.3	27.7

*Establishments primarily engaged in the retail sale of clothing, furnishings, and accessories for men, women and children without specializing in any one line.

**Less than 0.1%

(D) = Figures withheld by the U.S. Census Bureau to avoid disclosure of individual operations.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

Family clothing stores accounted for 13.2% of total reported sales of all men's and boys' wear in all retail outlets with payroll in 1977, up from 11.8% in 1972.

As previously noted, family clothing stores accounted for almost 15% of sales of men's overcoats and topcoats among reporting stores, 12% of suit, tailored jacket and slacks sales, almost 14% of rainwear and outerwear sales.

RETAIL SALES

Seasonal Patterns

Percent of Year's Total Men's Clothing Sales by Month
(Five Year Average*)

Total	100.0%
January	6.7
February	5.0
March	6.5
April	7.7
May	8.8
June	9.1
July	6.5
August	5.8
September	7.4
October	9.6
November	11.0
December	15.7

*Five year average, 1961-1965 (latest available).

Source: Newspaper Advertising Bureau based on Federal Reserve Board sales reports.

RETAIL ADVERTISING

As expected, reports of newspaper advertising linage for 1980 show overcoats to be advertised most heavily during the last quarter of the year, with November having the largest share of ad linage. The biggest month for advertising men's slacks is June, while the heaviest newspaper promotions on sport coats were in November. Men's suit advertising was heaviest in March, with April not far behind.

Percent of Year's Total Newspaper Advertising Linage on Men's Clothing
By Months, 1980

	Outercoats	Slacks	Sport Coats	Suits
Total	100.0%	100.0%	100.0%	100.0%
January	9.2	4.0	6.7	6.4
February	9.3	5.8	7.0	6.7
March	7.0	7.9	7.7	10.8
April	4.4	8.0	9.7	10.5
May	1.2	8.8	7.6	9.5
June	0.6	12.6	8.1	8.5
July	1.4	5.0	4.2	5.1
August	2.0	10.7	6.4	6.9
September	10.4	8.1	10.0	9.1
October	18.8	7.8	10.7	9.6
November	20.5	9.4	11.9	9.2
December	15.2	11.9	10.0	7.4

Source: Advertising Checking Bureau;
Newspaper Advertising Bureau, Inc.

CONSUMER PRICE INDEX

The consumer price index for all men's wear averaged 106.0 in 1980 (12/77=100), which represented a 4.4% increase over the 1979 average. Suits, sport coats and jackets advanced 2.2% in 1980 after this category had actually registered a decrease in price of 0.5% in the previous year. The men's coats and jackets group also decreased in price between 1978 and 1979, a 2.1% decline, but did show an increase in 1980, according to the index. This increase of 1.9% still left consumer prices below that of the the 1978 level.

Consumer Price Indexes on Selected Men's Wear
Annual Average 1980, 1979, 1978
(12/77=100)

	1980(p)	1979	1978	% Change 1980/1979	% Change 1980/1978
Men's Wear	106.0	101.5	99.9	+ 4.4%	+ 6.1%
Suits, sportcoats jackets	100.9	98.7	99.2	+ 2.2	+ 1.7
Coats & jackets	97.4	95.6	97.7	+ 1.9	- 0.3

(p) = preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

CONSUMER BUYING HABITS

In March 1980, the Celanese Fibers Marketing Company conducted a survey of 1,000 men 18 years of age and older to determine measurable segments in the men's wear market. The criteria for respondents was that they must have purchased at least three items from each of twelve different men's apparel categories within the last twelve months.

The survey results identified four major segments in the men's market based on consumer characteristics: the contemporary man (28% of the men's market), the establishment man (32% of the market), the inactive man (21% of the market) and the formative man (19% of the market). The table on the next page shows some demographic characteristics of each group.

(continued)

Demographic Profile of the Four Major Men's Segments

	Types of Men			
	Contemporary	Establishment	Inactive	Formative
Income:	100%	100%	100%	100%
Under $20,000	13	19	28	34
$20,000 - $25,000	20	19	21	23
$25,000 - $35,000	34	31	25	19
Over $35,000	24	22	13	13
Age:	100%	100%	100%	100%
Under 35	41	45	32	72
Over 35	59	55	68	28
Occupation:	100%	100%	100%	100%
Employed full time	91	90	78	80
White collar	72	66	49	28
Blue collar	18	23	29	51
Student	2	4	2	11
Retired	3	3	12	--
Education:	100%	100%	100%	100%
No college	29	21	45	59
Some college	31	39	26	31
College graduates	40	40	29	10
Marital Status:	100%	100%	100%	100%
Married	65	70	83	44
Single	22	22	12	44
Other (divorced, widowed, etc.)	13	8	5	12

Apart from classifying four segments of the men's wear market, the Celanese study also explored the buying habits of the various groups. The contemporary man, without exception spends more money per item of tailored clothing than other groups do, according to the average price paid.

The main difference between the contemporary man and the establishment man is the latter's conservative taste in apparel. Oldest of the four groups is the inactive man. Fully 12% of its members are retired. The formative man, comprised mostly of students and blue collar workers, have the least available income to spend on men's wear.

CONSUMER BUYING HABITS

Tailored Wear Buying Habits of Four Types of Men

	Slacks	Suits	Sport coats/ Blazers	Topcoats
Contemporary man (28% of market)				
% who purchased item in the last 12 months	80.0%	59.0%	37.0%	31.0%
Average no. purchased	3.2	3.5	1.5	1.1
Average purchase price	$29	$184	$115	$134
% purchased at sale prices	21.0%	26.0%	31.0%	31.0%
Establishment man (32% of market)				
% who purchased item in the last 12 months	87.0%	58.0%	36.0%	31.0%
Average no. purchased	3.0	3.1	1.3	1.0
Average purchase price	$21	$168	$99	$112
% purchased at sale prices	24.0%	36.0%	39.0%	45.0%
Inactive man (21% of market)				
% who purchased item in last 12 months	78.0%	42.0%	30.0%	20.0%
Average no. purchased	3.5	2.8	1.3	1.0
Average purchase price	$21	$134	$78	$85
% purchased at sale prices	42.0%	45.0%	53.0%	43.0%
Formative man (19% of market)				
% who purchased item in last 12 months	71.0%	36.0%	16.0%	16.0%
Average no. purchased	3.3	2.6	1.3	1.0
Average purchase price	$22	$128	$73	$93
% purchased at sale prices	42.0%	33.0%	29.0%	33.0%

An R.H. Bruskin survey asked 1,250 men, selected to mirror the national population, to indicate the most important factor in their decision when selecting their apparel. The results were published in Daily News Record (October 28, 1980) and indicated that 36% of all respondents ranked "fit/comfort" as their most important factor when purchasing men's wear. Price ranked next, followed (in descending order) by quality, color/style, brand name and lastly the store itself. This survey, when compared to a similar study in 1977, shows little significant change in attitude.

CONSUMER BUYING HABITS

"What is the most important factor in your decision whether to buy men's apparel"

	Fit/ Comfort	Price	Quality	Color/ Style	Brand/ Store Name
Total, all respondents	36%	24%	16%	12%	12%
Income:					
Under $10,000	29	38	12	10	9
$10,000 - $14,999	42	21	13	11	12
$15,000 - $19,999	37	24	17	10	12
$20,000 & over	39	16	18	14	13
Age:					
18 - 24	36	20	14	19	11
25 - 39	38	20	17	15	9
40 - 59	32	27	19	8	12
60 & over	37	30	12	5	15
Region:					
North East	36	25	15	14	9
North Central	37	20	16	9	16
South	29	32	13	12	12
West	43	14	22	13	8
Occupation:					
White collar	38	17	19	12	12
Blue collar	36	22	16	14	12

In another R.H. Bruskin survey done for Daily News Record (June 10, 1980) 1,300 men were asked what was the most they would pay for a suit. The results indicated that two-thirds of all men surveyed would pay $150 or less. There were several significant changes in this survey when it was compared to the responses of a similar group of men asked the identical question in July 1978.

Overall, the number of men who said they would pay less than $100 for a suit declined seven percentage points—from 38% of all men in 1978 to 31% in the current survey. The number of men willing to pay $150—$200 rose six percentage points between 1978 and 1980, to 21% of all men surveyed. A modest three point gain was found in the number of respondents spending $200 or more, rising from 6% in 1978 to 9% in the current sample.

Men's Expectations of Their Next Suit Purchase Price

	Under $100	$101 - $149	$150 - $200	Over $200
Total, all respondents*	31%	35%	21%	9%
Income:				
Under $10,000	50	35	9	4
$10,000 - $14,999	38	35	17	6
$15,000 - $19,999	30	41	21	6
$20,000 & over	18	33	31	15
Region:				
North East	21	49	22	7
North Central	33	32	24	8
South	40	32	16	9
West	28	27	25	15
Occupation:				
White collar	18	32	33	16
Blue collar	32	39	19	7
Education:				
High school grads.	31	41	19	7
College grads.	16	30	35	15

*Does not include 4% that answered "don't know."

The results of another R.H. Bruskin/Daily News Record poll (December 18, 1979) on whether men hold off purchases of men's wear in anticipation of a sale are reported below.

"Do you hold back your purchases of men's wear until stores run a sale"

	Always	Sometimes	Seldom/Never
Total, all respondents	15.3%	41.0%	42.3%
Income:			
Under $10,000	21.8	34.6	42.3
$10,000 - $14,999	13.8	46.3	38.4
$15,000 - $19,999	12.7	40.9	44.2
$20,000 & over	12.4	43.3	43.4
Age:			
18 - 24	10.9	43.7	44.5
25 - 39	14.9	42.8	41.3
40 - 59	14.6	42.9	40.2
60 & over	19.7	34.6	43.8

(continued)

"Do you hold back purchases of men's wear until stores run a sale"

	Always	Sometimes	Seldom/Never
Region:			
North East	10.7%	47.0%	40.7%
North Central	17.8	42.9	38.5
South	16.8	40.9	39.9
West	15.1	28.8	55.2

Note: Percentages may not add up to 100.0% due to rounding and the exclusion of "Don't know/No answer" responses in the surveys.

Data on purchases of specific types of men's wear, shown below, have been compiled by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc., of Floral Park, N.Y. This data is based on the findings of an ongoing monthly panel diary, tracking the purchases of 6,500 nationally representative families. (The data for men includes family members 17 years old and over.)

Suits

According to NPD data suits of polyester accounted for over 60% of total unit sales in 1980, up from 59% in 1978. The greatest amount of unit volume was in the $60.00 - $99.99 price range. Analysts report that an average of 59% of all men's suits are sold at off price.

Percent of Men's Suit Purchases by Fiber Content

	1980		1978
	Units	Dollars	Units
Total Units	100.0%	100.0%	100.0%
Polyester & polyester blends	60.7	50.0	59.0
Wool & wool blends	17.9	25.0	10.0
Cotton & cotton blends	2.0	2.7	5.0
All other material	19.4	22.3	26.0

Source: NPD Research, Inc.

Percent of Men's Suit Purchases by Price Point

	1980	
	Units	Dollars
Total units	100.0%	100.0%
Less than $60.00	27.2	11.5
$60.00 - $99.99	33.3	27.4
$100.00 - $139.99	21.7	25.9
$140.00 - $179.99	10.0	16.1
$180.00 & over	7.8	18.9

(continued)

CONSUMER BUYING HABITS

Suits

Percent of Years Total Suit Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	11.9	9.4	5.9	11.8	7.8	7.4	7.3	8.7	6.3	6.1	8.5	8.9
Dollars	100.0%	12.0	7.5	7.9	10.4	7.1	7.8	6.5	8.0	6.8	6.5	11.0	8.7

Source: NPD Research, Inc.

Men's specialty stores clearly dominate the suit market, accounting for over 14% of the total dollar volume reported in the NPD survey covering 1980 purchases and nearly 40% of the units. These figures are down from the 51.2% of dollar expenditures and 43.4% of units reported in 1978. Department stores were the second most important outlet and picked up some ground versus 1978 results. National chains also picked up sales share accounting for over 20% of reported unit purchases of men's suits last year—up from 17.1% in 1978.

Percent of Men's Suit Purchases by Type of Outlet

	1980		1978	
	Units	Dollars	Units	Dollars
Total sales	100.0%	100.0%	100.0%	100.0%
Men's specialty stores	39.8	47.1	43.1	51.2
Department stores	25.6	26.9	24.4	24.3
National chains	20.9	14.2	17.1	12.5
Discount stores	5.7	5.4	7.5	5.2
All other outlets	8.0	6.5	7.9	6.8

Source: NPD Research, Inc.

Sport Coats

As measured by NPD Research, Inc., based on the purchase diaries maintained by panel households, the total market for men's sport coats amounted to over 7.6 million units in 1980.

Breakdowns of purchases based on panel data covering fiber content, price point, outlet type, etc., are shown on the following charts.

Percent of Men's Sport Coat Purchases by Fiber Content

	1980		1978
	Units	Dollars	Units
Total units	100.0%	100.0%	100.0%
Polyester & polyester blends	55.7	43.1	55.0
Wool & wool blends	20.9	29.2	13.0
Cotton & cotton blends	4.6	4.5	7.0
All other materials	18.8	21.2	25.0

(continued)

CONSUMER BUYING HABITS

Sport Coats

Percent of Men's Sport Coat Purchases by Price Point

	1980	
	Units	Dollars
Total Units	100.0%	100.0%
Less than $20.00	10.8	2.7
$20.00 - $39.99	28.1	15.1
$40.00 - $59.99	23.4	19.9
$60.00 - $79.99	18.4	21.1
$80.00 - $119.99	10.9	17.2
$120.00 & over	8.5	24.0

Percent of Years Total Sport Coat Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	10.5	7.9	6.4	5.1	6.2	9.4	7.4	8.8	7.9	8.3	8.6	13.7
Dollars	100.0%	11.3	8.2	6.6	4.6	5.7	9.9	5.7	7.8	7.4	7.9	9.0	16.0

Source: NPD Research, Inc.

Percent of Men's Sport Coat Purchases by Type of Outlet

	1980		1978	
	Units	Dollars	Units	Dollars
Total sales	100.0%	100.0%	100.0%	100.0%
Men's specialty stores	30.9	40.2	31.3	42.2
Department stores	33.6	33.1	24.4	24.6
National chains	20.9	14.1	25.2	19.7
Discount stores	6.6	4.5	10.5	6.7
All other outlets	8.0	8.0	8.6	6.8

Source: NPD Research, Inc.

Raincoats

NPD projected the total market for men's raincoats to be 705,000 units in 1980 with a retail value of about $24.5 million. These figures reflect sales of slicker-type raincoats to a large extent.

The breakdown of men's rainwear sales by fiber type indicate the variety of types included by panel members in this category.

(continued)

CONSUMER BUYING HABITS

Raincoats

Percent of Men's Rainwear Purchases by Fiber Content

	1980	
	Units	Dollars
Total units	100.0%	100.0%
Polyester & polyester blends	18.7	35.2
Nylon & nylon blends	21.1	14.4
Vinyl	38.0	7.1
All other	6.5	2.6
Not reported	15.7	40.7

Percent of Men's Rainwear Purchases by Price Point

	1980	
	Units	Dollars
Total units	100.0%	100.0%
Less than $10.00	39.1	5.8
$10.00 - $29.99	32.0	16.8
$30.00 - $49.99	5.9	7.0
$50.00 - $69.99	7.4	13.9
$70.00 - $99.99	6.0	14.6
$100.00 & over	9.6	42.0

Percent of Years Total Raincoat Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	9.1	3.5	10.7	5.0	7.4	2.3	8.7	7.9	12.1	11.3	9.2	12.9
Dollars	100.0%	30.6	4.4	13.5	3.4	9.1	0.9	7.3	0.4	9.6	7.5	5.7	7.7

Percent of Men's Raincoat Purchases by Type of Outlet

	1980	
	Units	Dollars
Total sales	100.0%	100.0%
Discount stores	26.0	7.3
National chains	25.6	14.5
Department stores	18.1	15.2
Men's specialty stores	16.1	45.5
All other outlets	14.2	17.5

Source: NPD Research, Inc.

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store type.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) on number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans are included.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR, AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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INFANTS', TODDLERS', GIRLS' & BOYS' WEAR

Market Trends

After a rather lackluster year in 1979, the children's wear industry (infants', toddlers' and girls' wear) and the boys' wear industry showed a "respectable" gain in dollar volume in 1980, although unit demand remained about the same as the previous year.

In 1981, spring and fall orders for children's and boys' wear came in at a much brisker pace than 1980 and producers are confident of an excellent year. Industry sources indicate that 1981 dollar volume is running between 10% and 15% higher than that of 1980. Initial commitments and reorders, according to these same sources, are earlier this year so that retail outlets may reduce their end of season markdowns by selling out their stock at an earlier date.

Retailers seem to be favoring sportswear separates, particularly plain pocketed jeans, with their "back-to-school" open-to-buy for the 1981 season, at recent trade shows. This strategy is in line with recent consumer trends towards higher quality, multi-purpose garments for children.

Like the rest of the U.S. apparel industry, U.S. manufacturers of children's and boys' wear are faced with increasingly high-quality imports from the Far East and most recently Europe. The exact extent of overseas penetration into the domestic children's market is difficult to determine since figures are included with men's and women's wear import data. American producers, however, still have the advantage of their ability not only to create but to respond quickly to fashion trends.

One of the major factors for the revitalization of this industry is the increasing birthrate the U.S. has been experiencing since 1976. This, coupled with the increase in the population of women in the childbearing ages, has led to a corresponding jump in the number of children in this country. This trend toward an increasing number of births is expected to continue, according to the U.S. Bureau of the Census, through 1985 unless there is an offsetting decline in the birthrate.

The large general merchandise store chains are continuing to capture an increasing share of the children's wear market. A recent study in Chain Store Age (April 1981) concludes that this is due to the price consciousness of the markets' consumers'. Discount stores have been increasing their share of this highly profitable market by building on their image of budget clothing for children. However, many traditional department stores are stepping-up their efforts to capture the upscale children's wear business.

GENERAL STATISTICS ON THE INDUSTRY

According to the 1981 Industrial Outlook, published by the U.S. Department of Commerce, shipments in the Children's Outerwear Industry (SIC 236), including dresses, blouses, coats, and other outerwear were an estimated $1.9 billion in 1980 gaining 6.8% over the 1978 total. In the children's dress and blouse segment (SIC 2361), shipments in 1980 showed an estimated gain of 8.6% over 1978, reaching $509 million. The remaining value of shipments, $1.4 billion, was accounted for children's coats, suits and other outerwear (SIC's 2363 and 2369).

Census of Manufactures, 1977 data, published by the Census Bureau and the latest source of industry statistics, indicate a total of 870 companies in the industry, a decline of 9.8% from the 1972 total of 964.

Data for industry classifications separately reported on by the U.S. Bureau of the Census, based on the annual survey of manufactures for 1978 and the Census of Manufactures 1972 and 1977 are shown on the following tables. Boys' wear manufacturers are not separately classified in an industry group by the Census Bureau but are included with manufacturers of men's wear.

Children's Dresses & Blouses (SIC 2361*)

	1978	1977	1972	% Change 1977/1972
Number of companies	na	455	439	+ 3.6%
Number of establishments, total**	na	519	490	+ 5.9
Number with 20 or more employees	na	374	353	+ 5.9
Employees, total (thous.)	35.5	35.2	35.4	- 0.6
Production workers (thous.)	30.8	30.4	31.0	- 2.0
Payroll (mil. $)	$248.4	$228.4	$174.4	+31.0
Value added by manufacture# (mil. $)	476.5	444.6	335.8	+32.4
Value of shipments## (mil. $)	896.0	824.7	655.2	+25.9
Capital expenditures, new (mil. $)	0.8	6.4	12.9	-50.4

Children's Coats & Suits (SIC 2363*)

	1978	1977	1972	% Change 1977/1972
Number of companies	na	108	155	-30.4
Number of establishments, total**	na	120	165	-27.3
Number with 20 or more employees	na	70	105	-33.4
Employees, total (thous.)	6.4	6.7	9.2	-27.2
Production workers (thous.)	5.7	5.7	8.1	-29.6
Payroll (mil. $)	$ 46.5	$ 45.8	$ 48.5	- 5.6
Value added by manufacture# (mil. $)	91.5	90.2	90.4	- 0.3
Value of shipments## (mil. $)	178.0	173.8	188.5	- 7.8
Capital expenditures, new (mil. $)	0.8	1.3	0.8	+62.5

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Children's Other Outerwear (SIC 2369*)

	1978	1977	1972	% Change 1977/1972
Number of companies	na	307	370	-17.1
Number of establishments, total**	na	363	406	-10.6
Number with 20 or more employees	na	242	265	- 8.7
Employees, total (thous.)	32.5	29.3	30.1	- 2.7
Production workers (thous.)	28.3	25.1	26.8	- 6.3
Payroll (mil. $)	$211.5	$184.9	$144.6	+27.9
Value added by manufacture# (mil. $)	436.4	344.4	282.9	+21.7
Value of shipments## (mil. $)	794.6	718.8	578.2	+24.3
Capital expenditures, new (mil. $)	5.7	6.7	6.1	+ 9.8

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, shown below:

SIC 2361 comprises establishments primarily engaged in manufacturing girls', children's and infants' dresses, blouses, waists, and shirts, cut and sewed from purchased woven or knit fabric.

SIC 2363 covers establishments primarily engaged in manufacturing girls', children's and infants' coats and suits, cut and sewed from woven and knit fabric.

SIC 2369 includes establishments primarily engaged in manufacturing girls', children's and infants' outerwear, not elsewhere classified, cut and sewed from purchased woven or knit fabric. It covers items such as tops, playwear, swimwear, robes, skirts, headwear, neckwear, etc.

NOTE: Separate industry figures are not available on boys' wear and on children's underwear and nightwear manufacturers, but are combined in industry data on men's and boys' manufacturers and women's and children's manufacturers, which are covered in other Fact Files covering specific apparel categories.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of total shipments, including manufacturers classified in these industries as well as secondary producers, is covered on page 33.

na = not available.
(e) = estimated.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1972, 1977 and
Annual Survey of Manufactures, 1978.

GENERAL STATISTICS ON THE INDUSTRY

Employment and Earnings

Current information on employment in segments of the children's wear industry is published by the Department of Labor, Bureau of Labor Statistics. Production worker employment in children's outerwear averaged 53,900 workers in 1980, down 4.3% from 56,300 in 1979. The Bureau of Labor Statistics reported 63,200 people employed in the children's outerwear segment of the industry. This figure is down 3.2% from the total of the previous year.

In girls' dresses and blouses, production worker employment averaged 22,500 workers in 1980 against 24,000 workers in 1979. This is a reduction of 6.3%. Total employment in this area for 1980 stood at 25,000, 6.4% lower than the figure reported in 1979.

Employment & Earnings in the Children's Outerwear, Dress & Blouse Industries
(Annual Averages)

	1980	1979	% Change 1980/1979
Children's outerwear:			
All employees (thous.)	63.2	65.3	- 3.2%
Production workers (thous.)	53.9	56.3	- 4.3
Average weekly earnings	$151.20	$137.86	+ 9.7
Average weekly hours	36.0	35.9	+ 0.3
Average overtime hours	1.2	1.2	--
Dresses & blouses:			
All employees (thous.)	25.0	26.7	- 6.4%
Production workers (thous.)	22.5	24.0	- 6.3
Average weekly earnings	$146.91	$136.06	+ 8.0
Average weekly hours	35.4	35.9	- 1.4
Average overtime hours	0.9	1.2	- 25.0

Source: U.S. Bureau of Labor Statistics,
Employment and Earnings,
March issues, 1980 & 1981.

Concentration in the Industry

Although the total number of plants in the children's wear industry declined by 5.6% to 1,002 establishments, between 1972 and 1977, those which manufacture dresses and blouses did register an increase of nearly 6% to 519 units during the same period. This increase was countered by a 27.3% decrease in coat and suit plants and a 10.6% decline in children's outerwear factories, to 120 and 363 units, respectively.

Based on information gleaned from the Census Bureau, 31.5% of children's apparel plants employ less than 20 persons per plant. Chief among these are plants producing children's dresses and blouses. These plants represent 14.5% of the total. This segment also leads the children's wear industry in total employment with a 64.7% representation while accounting for 51.8% of the industries plants.

(continued)

Concentration in the Industry (continued)

Better than one out of three of the plants in the children's wear industry employ 100 or more people. In the largest segment of the industry (dresses and blouses) 34.7% of the plants have 100 or more employees. In outerwear (other than coats and suits), better than 38% of the plants have 100 or more workers.

The Children's Apparel Industry By Employment Size, 1977

	Establishments		Employees		Annual Payroll	
	Number	%	Number	%	Mil.$	%
Dresses & blouses (SIC 2361*), total	519	100.0%	35,200	100.0%	228.4	100.0%
By establishment size:						
Under 20 employees	145	27.9	12,000	34.1	8.7	3.8
20 - 49	169	32.5	5,700	16.2	36.6	16.0
50 - 99	111	21.4	7,900	22.4	54.8	24.0
100 - 249	67	12.9	10,100	28.7	64.8	28.4
250 or more	27	5.2	10,400	29.5	63.6	27.8
Coats & suits (SIC 2363*), total	120	100.0	6,700	100.0	45.8	100.0
By establishment size:						
Under 20 employees	50	41.7	400	6.0	3.7	8.1
20 - 49	30	25.0	1,000	14.9	7.0	15.3
50 - 99	22	18.3	1,500	22.4	10.0	21.8
100 - 249	14	11.7	2,100	31.3	13.7	29.9
250 or more	4	3.3	1,700	25.4	11.4	24.9
Other outerwear (SIC 2369*), total	363	100.0	29,300	100.0	184.9	100.0
By establishment size:						
Under 20 employees	121	33.3	900	3.1	6.2	3.4
20 - 49	90	24.8	3,000	10.2	19.5	10.5
50 - 99	57	15.7	3,900	13.3	27.6	14.9
100 - 249	71	19.6	11,300	38.6	70.0	37.9
250 or more	6	1.7	4,400	15.0	28.0	15.1

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made. See explanation of individual SIC numbers on page 3.

Source: U.S. Department of Commerce,
Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC-77-1-23-B.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Employment & Share of Shipments of Children's Wear in Large Plants, 1977-1979

	Number of Plants		% of Total Shipments Accounted for by Plants With 100+ Employees
	With 20+ Employees	With 100+ Employees	
Children's dresses & blouses (SIC 2361*)			
1980	252	96	72%
1979	276	96	68
1978	270	98	70
1977	243	92	69
Children's coats & suits (SIC 2363*)			
1980	59	20	67%
1979	73	24	65
1978	72	23	65
1977	64	22	69
Children's outerwear, n.e.c. (SIC 2369*)			
1980	242	101	78%
1979	262	102	74
1978	257	96	74
1977	241	100	77

n.e.c. = not elsewhere classified
* For definitions of SIC numbers, see page 3.

Source: Sales & Marketing Management,
"Survey of Industrial Buying Power,"
1978, 1979, 1980 & 1981 editions.
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Operating Ratios

Key Business Ratios in the Children's Wear Industry, 1980
(Median Results)

	Children's Dresses & Blouses (SIC 2361*)	Children's Coats & Suits (SIC 2363*)	Children's Outerwear, n.e.c. (SIC 2369*)
Number of manufacturing firms reporting	81	23	59
Current assets to current debt (times)	1.89	1.74	1.88
Net profits on net sales (percent)	2.71	2.84	2.66
Net profits on net worth (percent)	17.40	20.06	17.98
Net sales to net worth (times)	5.91	6.65	6.58
Net sales to net working capital (times)	6.96	7.71	6.79
Average collection period (days)	51	43	28
Net sales to inventory (times)	6.8	8.0	9.6

*For definitions of SIC numbers, see page 3.

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
1980 Key Business Ratios,
(All rights reserved.)

GENERAL STATISTICS ON THE INDUSTRY

By Region

New York State accounted for the major share of plants in 1977 with 32.0% of the total, followed closely by Pennsylvania and New Jersey which represented 12.0% and 11.1%, respectively. Combined, these three states contained 462 of the industries 1,002 plants.

Not coincidentally, the leading states in employment were also New York, Pennsylvania and New Jersey, accounting for nearly 34% of the industries 71.2 thousand employees.

Children's Wear Industry
By Geographic Region and Leading States, 1977

	Number of Establishments		Employees	
	Total	20 or More Employees	Thousands	% of Total**
Children's dresses & blouses (SIC 2361*)				
Total U.S.	519	374	35.2	100.0%
Middle Atlantic				
New York	154	91	5.6	15.9
New Jersey	56	41	2.3	6.5
Pennsylvania	79	65	5.6	15.9
South Atlantic				
North Carolina	35	34	3.3	9.4
Georgia	8	6	0.4	1.1
Florida	22	14	0.8	2.3
West South Central				
Texas	20	16	2.2	6.3
Pacific				
California	35	20	1.8	5.1
Children's coats & suits, (SIC 2363*)				
Total U.S.	120	70	6.7	100.0%
Middle Atlantic				
New York	46	19	1.3	19.4
New Jersey	27	13	0.9	13.4
Pennsylvania	10	8	0.7	10.4
South Atlantic				
North Carolina	6	4	0.5	7.5
Georgia	5	5	0.3	4.5
Children's outerwear, n.e.c. (SIC 2369*)				
Total U.S.	363	242	29.3	100.0%
New England				
Massachusetts	16	9	1.0	3.4

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

Children's Wear Industry
By Geographic Region and Leading States, 1977
(continued)

	Number of Establishments		Employees	
	Total	20 or More Employees	Thousands	% of Total**
Children's outerwear, n.e.c. (SIC 2369*) (continued)				
Middle Atlantic				
New York	121	59	4.0	13.7%
New Jersey	28	17	1.4	4.8
Pennsylvania	31	28	2.2	7.5
South Atlantic				
Virginia	7	7	1.8	6.1
North Carolina	22	19	3.4	11.6
Georgia	13	13	2.2	7.5
Florida	16	11	1.0	3.4
East South Central				
Tennessee	6	5	0.9	3.1
Alabama	15	11	2.2	7.5

n.e.c. = not elsewhere classified
* For full definitions of SIC numbers, see page 3.
** Percent distribution does not equal 100.0% due to disclosures. States with disclosures are not shown.

Source: U.S. Department of Commerce,
Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCTION

Children's & Girls' Wear

Unit production of children's wear items covered in the Census Bureau reports totaled 1,315.6 million units in 1979, advancing 1.2% ahead of the comparable total of 1,300.4 million in 1978.

Girls' subteen and teenage shorts showed the greatest gain in production in 1979, up 35.1% to 5,496,000 units from the 4,068,000 reported in 1978. Slips, vests, undershirts and other underwear except panties also did well, swelling to 71,064,000 units from 1978's 54,468,000, a 30.5% rise.

Nightwear, as a category, bucked the trend toward higher production in 1979 by plummeting 22.6% to 71,280,000 from 92,064,000 in the previous year. The biggest loser of the group was infants' and toddlers' nightgowns which slid 26% during the period. All other categories of nightwear declined by at least 21%.

The largest groups, childrens' and infants' hosiery and diapers both showed increases in 1979 to 386,568,000 and 112,896,000, up 8.2% and 4.0% respectively. Combined these two accounted for nearly 38% of total production of children's wear, up from 35.8% in 1978.

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979

	(Thous. Units) 1979	(Thous. Units) 1978	% Change 1979/1978
Dresses, total	69,804	70,080	- 0.4%
Girls', subteen & teenage girls'	27,528	27,312	+ 0.8
By construction:			
Woven fabric	16,668	16,992	- 1.9
Knit fabric	10,860	10,320	+ 5.2
By fabric:			
All cotton & chiefly cotton	9,312	9,096	+ 2.4
All man-made & chiefly man-made	17,676	17,736	- 0.3
All wool & chiefly wool All other fabric	540	480	+ 12.5
Children's dresses	26,196	28,488	- 8.0
By construction:			
Woven fabric	18,948	20,460	- 7.4
Knit fabric	5,280	5,700	- 7.4
Construction, n.s.k.	1,968	2,328	- 15.5
By fabric:			
All cotton & chiefly cotton	7,092	7,992	- 11.3
All man-made & chiefly man-made	17,184	18,180	- 5.5
Fabric, n.s.k.	1,920	2,316	- 17.1
Infants' & toddlers' dresses	16,080	14,280	+ 12.6
By construction:			
Woven fabric	11,040	9,363	+ 14.6
Knit fabric	2,064	2,016	+ 2.4
Construction, n.s.k.	2,976	2,628	+ 13.2
By fabric:			
All cotton & chiefly cotton	3,768	4,236	- 11.0
All man-made & chiefly man-made	9,636	7,032	+ 37.0
All other fabric Fabric, n.s.k.	2,676	3,012	- 11.2
Blouses (excluding knit outerwear sport shirts), total	46,272	48,228	- 4.1
Girls', subteen & teenage girls'	27,600	28,968	- 4.8
By construction:			
Woven fabric	17,088	18,096	- 5.6
Knit fabric	8,616	6,996	+ 23.1
Construction, n.s.k.	1,896	3,876	- 51.1
By fabric:			
All cotton & chiefly cotton	4,092	5,100	- 19.8
All man-made & chiefly man-made	20,208	18,648	+ 8.4
All other fabric Fabric, n.s.k.	3,300	5,220	- 36.8

(continued)

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units)		% Change
	1979	1978	1979/1978
Bloquses (continued)			
Children's, infants' & toddlers'	18,672	19,260	- 3.1%
By construction:			
Woven fabric	8,436	8,064	+ 4.6
Knit fabric	10,236	11,196	- 8.6
By fabric:			
All cotton & chiefly cotton	6,300	5,160	+ 22.1
All man-made & chiefly man-made	10,956	12,840	- 14.7
All other fabric Fabric, n.s.k.	1,416	1,260	+ 12.4
Knit outerwear sport shirts, excluding sweat shirts, total	131,820	138,120	- 4.6
Girls', subteen & teenage girls' knit outerwear sport shirts	18,408	21,048	- 12.6
All cotton & chiefly cotton	7,152	7,440	- 3.9
All man-made & chiefly man-made	11,256	13,608	- 17.3
Children's knit outerwear sport shirts	72,564	70,464	+ 3.0
All cotton & chiefly cotton	19,260	14,784	+ 30.3
All man-made & chiefly man-made	53,304	55,680	- 4.3
Infants' & toddlers' knit outerwear sport shirts	40,848	46,608	- 12.4
All cotton & chiefly cotton	8,256	9,240	- 10.7
All man-made & chiefly man-made	32,592	37,368	- 12.8
Girls', children's, infants' & toddlers' sweat shirts	na	na	na
Girls', children's & infants' sweaters, including sweater vests	11,316	13,356	- 15.3
All cotton & chiefly cotton	na	na	na
All man-made & chiefly man-made	9,300	10,428	- 10.8
All wool & chiefly wool	na	na	na
Coats, excluding coat & legging sets	4,800	4,740	+ 1.3
Girls', subteen, & teenage girls' coats	2,244	2,244	--
By construction:			
Woven fabric Knit fabric	2,244	2,244	--
By fabric:			
All cotton & chiefly cotton	108	84	+ 28.6
All man-made & chiefly man-made	720	744	- 3.2
All wool & chiefly wool	1,416	1,416	--

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Coats (continued)			
Children's & infants' coats	2,556	2,496	+ 2.4%
By construction:			
Woven fabric	2,556	2,496	+ 2.4
Knit fabric			
By fabric:			
All cotton & chiefly cotton	2,424	2,280	+ 6.3
All man-made & chiefly man-made	132	216	- 38.9
All wool & chiefly wool			
Coat & legging sets, coat & snow pants sets, & ski & snow suits, total girls', children's, infants' & toddlers'	2,652	3,600	- 26.3
By construction:			
Woven fabric	2,652	3,600	- 26.3
Knit fabric			
By fabric:			
All cotton & chiefly cotton	**	**	
All man-made & chiefly man-made	2,268	3,120	- 27.3
All wool & chiefly wool	384	480	- 20.0
All other fabric			
Fabric, n.s.k.			
Raincoats & rain capes, total—girls', children's & toddlers'	396	456	- 13.2
Jackets, total—girls', children's & infants'	6,348	6,612	- 4.0
By construction:			
Woven fabric	6,348	6,612	- 4.0
Knit fabric			
By fabric:			
All cotton & chiefly cotton	264	288	- 8.3
All man-made & chiefly man-made	5,112	4,848	+ 5.4
All wool & chiefly wool	972	1,476	- 34.1
All other fabric			
Fabric, n.s.k.			
Vests, total—girls', children's & infants'	1,992	1,884	+ 5.7
By construction:			
Woven fabric	444	156	+184.6
Knit fabric	1,008	924	+ 9.1
Construction, n.s.k.	540	804	- 32.8
By fabric:			
All cotton & chiefly cotton	780	432	+ 80.6
All man-made & chiefly man-made	1,284	1,452	- 11.6

(continued)

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	(Thous. Units) 1978	% Change 1979/1978
Suits, total—girls', children's & infants'	5,856	5,760	+ 1.7%
By construction:			
Woven fabric	5,760	5,460	+ 5.5
Knit fabric	96	300	- 68.0
By fabric:			
All cotton & chiefly cotton	2,292	2,016	+ 13.7
All man-made & chiefly man-made	3,480	3,672	- 5.2
All other fabric	84	72	+ 16.7
Skirts, total—girls', children's & infants'	8,244	7,968	+ 3.5
By construction:			
Woven fabric	4,200	4,140	+ 1.4
Knit fabric	2,496	2,184	+ 14.3
Construction, n.s.k.	1,548	1,644	- 5.8
By fabric:			
All cotton & chiefly cotton	1,584	1,536	+ 3.1
All man-made & chiefly man-made	5,712	5,496	- 3.9
All wool & chiefly wool Fabric, n.s.k.	948	936	+ 1.3
Slacks, including jean-cut casual slacks, total—girls', subteen & teenage girls'	16,548	18,012	- 8.1
By construction:			
Woven fabric	11,916	8,376	+ 42.3
Knit fabric	1,740	3,132	- 44.4
Construction, n.s.k.	2,892	6,504	- 55.5
By fabric:			
All cotton & chiefly cotton	3,828	2,976	+ 28.6
All man-made & chiefly man-made	10,956	9,552	+ 14.7
All wool & chiefly wool All other fabric Fabric, n.s.k.	1,764	5,484	- 67.8
Jeans & dungarees, total—girls', subteen & teenage girls'	10,044	10,356	- 3.0
All cotton & chiefly cotton	5,952	7,080	- 15.9
All man-made & chiefly man-made	600	576	+ 4.2
Fabric, n.s.k.	3,492	2,700	+ 29.3
Slacks, including jean-cut casual slacks, total—children's & infants'	25,188	22,056	+ 14.2
By construction:			
Woven fabric	14,256	10,356	+ 37.7
Knit fabric	5,340	6,228	- 14.3
Construction, n.s.k.	5,592	5,472	+ 2.2

(continued)

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	(Thous. Units) 1978	% Change 1979/1978
Slacks—children's & infants' (cont'd.)			
By fabric:			
All cotton & chiefly cotton	9,096	7,332	+ 24.1%
All man-made & chiefly man-made	12,996	11,328	+ 14.7
All wool & chiefly wool All other fabric	1,260	1,368	- 7.9
Fabric, n.s.k.	1,836	2,028	- 9.5
Jeans & dungarees, total—children's & infants'	19,284	21,480	- 10.2
All cotton & chiefly cotton	13,200	11,268	+ 17.1
All man-made & chiefly man-made	4,476	7,884	- 43.2
Fabric, n.s.k.	1,608	2,328	- 30.9
Shorts, total—girls', subteen & teenage girls'	5,496	4,068	+ 35.1
By construction:			
Woven fabric	2,748	1,332	+106.3
Knit fabric	840	900	- 6.7
Construction, n.s.k.	1,908	1,836	+ 3.9
By fabric:			
All cotton & chiefly cotton	1,884	1,152	+ 63.5
All man-made & chiefly man-made	900	1,092	- 17.6
Fabric, n.s.k.	2,712	1,824	+ 48.7
Playgarments, including playsuits & halter tops, total—girls', subteen & teenage girls'	4,488	4,428	+ 1.4
By construction:			
Woven fabric Knit fabric	4,488	4,428	+ 1.4
By fabric:			
All cotton & chiefly cotton All man-made & chiefly man-made	4,488	4,428	+ 1.4
Shorts, total—children's & infants'	15,132	16,488	- 8.2
By construction:			
Woven fabric	7,872	8,268	- 4.8
Knit fabric	5,412	5,964	- 9.3
Construction, n.s.k.	1,848	2,256	- 18.1
By fabric:			
All cotton & chiefly cotton	4,920	5,328	- 7.7
All man-made & chiefly man-made	8,400	9,204	- 8.7
All other fabric Fabric, n.s.k.	1,812	1,956	- 7.4

(continued)

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	1978	% Change 1979/1978
Playgarments, including playsuits & halter tops, total—children's	23,112	30,636	- 24.6%
By construction:			
Woven fabric	17,028	24,168	- 29.5
Knit fabric	4,464	4,128	+ 8.1
Construction, n.s.k.	1,620	2,340	- 30.8
By fabric:			
All cotton & chiefly cotton	15,720	19,600	- 19.8
All man-made & chiefly man-made	7,392	11,028	- 33.0
Playgarments, including creepers & rompers, total—infants' & toddlers'	64,092	67,680	- 5.3
By construction:			
Woven fabric	26,388	25,836	+ 2.1
Knit fabric	32,352	35,916	- 9.9
Construction, n.s.k.	5,352	5,928	- 9.7
By fabric:			
All cotton & chiefly cotton	18,900	19,368	- 2.4
All man-made & chiefly man-made	40,344	43,140	- 6.5
All other fabric	--	--	
Fabric, n.s.k.	4,848	5,172	- 6.3
Swimsuits, total—girls', children's, & infants'	11,244	11,232	+ 0.1
By construction:			
Woven fabric	4,560	4,380	+ 4.1
Knit fabric	6,684	6,852	- 2.5
By fabric:			
All cotton & chiefly cotton	468	504	- 7.1
All man-made & chiefly man-made	7,728	8,004	- 3.4
Fabric, n.s.k.	3,048	2,724	+ 11.9
Underwear			
Panties, including pettipants, total--girls' & children's	96,756	99,252	- 2.5
By construction:			
Woven fabric	9,864	7,752	+ 27.2
Knit fabric	86,892	83,868	+ 3.6
Construction, n.s.k.	--	7,632	na
By fabric:			
All cotton & chiefly cotton	57,156	54,912	+ 4.1
All man-made & chiefly man-made	32,616	29,040	+ 12.3
Fabric, n.s.k.	6,984	15,300	- 54.4

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units)		% Change
	1979	1978	1979/1978
Underwear (continued)			
Slips, vests, & undershirts, total—girls' & children's	26,556	22,980	+ 15.6%
By construction:			
Woven fabric	2,412	1,752	+ 37.7
Knit fabric	24,144	21,228	+ 13.7
By fabric:			
All cotton & chiefly cotton	11,412	9,864	+ 17.8
All man-made & chiefly man-made	15,144	13,296	+ 13.9
Panties, total—infants' & toddlers'	73,500	66,792	+ 10.0
By construction:			
Woven fabric	2,076	1,176	+ 76.5
Knit fabric	71,424	61,080	+ 16.9
Construction, n.s.k.	--	4,356	na
By fabric:			
All cotton & chiefly cotton	58,884	49,380	+ 19.2
All man-made & chiefly man-made	14,916	17,412	- 14.3
Slips, vests, undershirts & other underwear except panties, total—infants' & toddlers'	71,064	54,468	+ 30.5
By construction:			
Woven fabric	240	264	- 9.1
Knit fabric	68,256	48,048	+ 42.1
Construction, n.s.k.	2,568	6,156	- 58.3
By fabric:			
All cotton & chiefly cotton	51,180	45,192	+ 13.3
All man-made & chiefly man-made	7,092	3,120	+127.3
Fabric, n.s.k.	12,792	5,156	+148.1
Nightwear			
Nightwear, excluding robes, total—girls', children's, infants' & toddlers'	71,280	92,064	- 22.6
Nightgowns, total—girls' & children's	11,208	14,280	- 21.5
By construction:			
Woven fabric	4,284	6,312	- 32.1
Knit fabric	6,924	7,968	- 13.1
By fabric:			
All cotton & chiefly cotton	3,564	4,284	- 16.8
All man-made & chiefly man-made	7,644	9,996	- 23.5

(continued)

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	(Thous. Units) 1978	% Change 1979/1978
Nightwear (continued)			
Pajamas including heavyweight sleeping garments made with feet, total—girls' & children's	16,788	21,504	- 21.9%
By construction:			
Woven fabric	2,064	7,212	- 71.4
Knit fabric	14,724	14,292	+ 3.0
By fabric:			
All cotton & chiefly cotton	1,236	1,044	+ 18.4
All man-made & chiefly man-made All other fabric	13,812	18,528	- 25.4
Fabric, n.s.k.	1,740	1,932	- 9.9
Nightgowns, total—infants' & toddlers'	11,256	15,204	- 26.0
By construction:			
Woven fabric	1,620	1,668	- 2.9
Knit fabric	9,636	13,536	- 28.8
By fabric:			
All cotton & chiefly cotton	360	2,496	- 85.6
All man-made & chiefly man-made	8,544	11,304	- 24.4
Fabric, n.s.k.	732	1,404	- 47.9
Pajamas including heavyweight sleeping garments made with feet, total—infants' & toddlers'	32,028	41,076	- 22.0%
By construction:			
Woven fabric	1,632	1,716	- 4.9
Knit fabric	29,532	37,860	- 22.0
Construction, n.s.k.	864	1,500	- 42.4
By fabric:			
All cotton & chiefly cotton	2,196	2,412	- 9.0
All man-made & chiefly man-made	23,052	30,852	- 25.3
All other fabric	2,364	1,560	+ 51.5
Fabric, n.s.k.	4,416	6,252	- 29.4
Robes, total—girls', children's & infants'	4,152	5,160	- 19.5

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	(Thous. Units) 1978	% Change 1979/1978
Diapers			
Diapers, total	112,896	108,600	+ 4.0%
Bird's-eye	52,836	50,928	+ 3.7
Gauze	60,060	57,672	+ 4.1
Hosiery			
Hosiery, total—children's & infants'	386,568	357,204	+ 8.2
Footsocks	11,196	4,116	+172.0
Anklets	264,732	265,692	- 0.4
Knee-highs	101,652	77,376	+ 31.4
Waist-high	8,988	10,020	- 10.3

n.s.k. = not specified by kind
na = not available
**Included in all other fabric to avoid disclosing figures for individual companies.

Sources: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel, MA-23A-(79)-1.

National Association of Hosiery
Manufacturers, 1979 Hosiery Statistics.

National Cotton Council of America,
Cotton Counts Its Customers 1979.

Production of Children's & Girls' Wear by Fabric & Construction—1978, 1979
(Percent Distribution)

	Percent	
	1979	1978
Girls', subteen & teenage girls' coats, total	100.0%	100.0%
By fabric:		
All wool & chiefly wool	63.1	63.1
Other fabric	36.9	36.9
Children's & infants' coats, total	100.0%	100.0%
By fabric:		
All wool & chiefly wool	5.2	8.7
Other fabric	94.8	91.3
Girls', subteen & teenage girls' dresses, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	33.8	33.3
All wool & chiefly wool & other fabrics	2.0	1.8
All man-made & chiefly man-made	64.2	64.9
By construction:		
Knit fabric	39.5	37.8
Woven fabric	60.5	62.2
Children's dresses, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	27.1	28.1
All man-made & chiefly man-made	65.6	63.8
Fabric, n.s.k.	7.3	8.1
By construction:		
Knit fabric	20.2	20.0
Woven fabric	72.3	71.8
Construction, n.s.k.	7.5	8.2
Infants' & toddlers' dresses, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	23.4	29.7
All man-made & chiefly man-made	59.9	49.2
Fabric, n.s.k.	16.6	21.1
Girls', subteen & teenage girls' blouses, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	14.8	17.6
Other fabric & fabric, n.s.k.	85.2	82.4
Children's, infants' and toddlers' blouses, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	33.7	26.8
Other fabric	66.3	73.2

(continued)

Production of Children's & Girls' Wear by Fabric & Construction—1978, 1979

(Percent Distribution)
(continued)

	Percent	
	1979	1978
Girls', children's & infants' skirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	19.2	19.3
All wool & chiefly wool	11.5	11.7
All man-made & chiefly man-made	69.3	69.0
Girls', subteen & teenage girls' slacks, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	23.1	16.5
Other fabric	76.9	84.5
Children's slacks & shorts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	36.1	33.2
Other fabric	56.6	57.6
Fabric, n.s.k.	7.3	9.2
Girls', subteen & teenage girls' knit outerwear shirts, excluding sweat shirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	38.8	35.3
All man-made & chiefly man-made	61.2	64.7
Children's knit sport shirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	26.5	21.0
All man-made & chiefly man-made	73.5	79.0
Infants' & toddlers' knit shirts, excluding sweat shirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	20.2	20.5
All man-made & chiefly man-made	79.8	79.5
Children's play garments, including playsuits & halter tops, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	68.0	64.0
Other fabric	32.0	36.0
Girls', children's & infants' swimsuits, total	100.0%	100.0%
By Construction:		
Knit fabric	40.6	39.0
Woven fabric	59.4	61.0

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction—1978, 1979
(Percent Distribution)
(continued)

	Percent	
	1979	1978
Innerwear, Nightwear		
Girls' & children's panties, drawers, bloomers, including pettipants, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	59.1	55.3
Other fabric	33.7	29.3
Fabric, n.s.k.	7.2	15.4
By construction:		
Knit fabric	87.5	84.5
Woven fabric & construction, n.s.k.	12.5	15.5
Infants' diapers, total	100.0%	100.0%
By fabric:		
Bird's-eye	46.8	46.9
Gauze	53.2	53.1
Girls' & children's nightgowns, total	100.0%	100.0%
By construction:		
Woven fabric	38.2	44.2
Knit fabric	61.8	55.8
Girls' & children's pajamas, total	100.0%	100.0%
By construction:		
Woven fabric	12.3	33.5
Knit fabric	87.7	66.5
Infants' & toddler's nightgowns, including kimonos, total	100.0%	100.0%
By construction:		
Woven fabric	14.4	11.0
Knit fabric	85.6	89.0
Infants' & toddlers' pajamas, total	100.0%	100.0%
By construction:		
Woven fabric	5.1	4.2
Knit fabric	92.2	92.2
Construction, n.s.k.	2.7	3.6

*Comparable figures for earlier years are not available for most items as the Census Bureau increased the number of manufacturers covered when conducting the 1977 apparel survey.

**Preliminary 1978 figures.
n.s.k. = not specified by kind.

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Apparel, 1979, MA-23A(79)-1 (December 1980); For diapers, the source is: National Cotton Council of America, Cotton Counts Its Customers, (1979 Edition).

PRODUCTION

Boys' Wear

According to the U.S. Bureau of the Census, production of reported categories of boys' wear fell to 519,379,000 units in 1979, down 6.2% from the comparable figure of 553,802,000 units in 1978.

The major share of production was credited to the knit sport shirts, except sweat shirts category, which accounted for over 26% with 136,848,000 units in volume. Following this category in importance are lightweight undershirts with ¼ sleeves, excluding T-shirts made for outerwear and jeans and dungarees. These two groups accounted for 79,512 and 48,403 units in volume and 15.3% and 9.3% in market share, respectively.

Among the reported classifications of boys' wear, nontailored light outer jackets showed the greatest decline in output in 1979, down 32.9% to 4,884,000 units from 7,284,000 in the preceding year. Also recording large declines were casual (nontailored) sportscoats and jackets which registered a 26.3% decline to 1,586,000 units; separate dress and sport trousers at 20,962,000, a 23.8% dip and nontailored heavy outer jackets, except ski, a 19.9% slide to 5,112,000 units.

Even though the industry, as a whole did show a decline in production in 1979, several categories did manage to show increases. Leading these groups was separate vests, excluding sweater vests which climbed from 1,223,000 in 1978 to 1,880,000 in 1979, a 53.7% increase. Gains were also registered, although not as dramatic, by tailored suit-type dress and sport coats, up 29.3% to 1,435,000 units and pajamas and other nightwear, up 6.9% to 16,380,000.

Production of Specified Types of Boys' Wear—1978, 1979

	(Thous. Units) 1979	(Thous. Units) 1978	% Change 1979/1978
Boys' Suits, Coats			
Boys' tailored suits, including uniform	4,351	4,673	- 6.9%
By fabric:			
All man-made & chiefly man-made	3,710	3,938	- 5.8
All wool & chiefly wool	196	181	+ 8.3
All other fabric	277	355	- 22.0
Fabric, n.s.k.	168	199	- 15.6
By construction:			
Woven fabric	3,377	3,603	- 6.3
Knit fabric	974	1,070	- 9.0
Boys' overcoats, topcoats & tailored suburban & car coats, including uniform	598	643	- 7.0
By fabric:			
All man-made & chiefly man-made	496	225	+120.4
All wool & chiefly wool All other fabric	102	418	- 75.6
By construction:			
Woven fabric Knit fabric	598	643	- 7.0
Boys' tailored suit-type dress & sport coats, including uniform	1,435	1,110	+ 29.3
By fabric:			
All cotton & chiefly cotton	213	180	+ 18.3
All man-made & chiefly man-made	785	659	+ 19.1
All wool & chiefly wool All other fabric	437	271	+ 61.3
By construction:			
Woven fabric	1,217	913	+ 33.3
Knit fabric	218	197	+ 10.7
Boys' casual (nontailored) sport coats & jackets	1,586	2,151	- 26.3
By fabric:			
All cotton & chiefly cotton	703	na	na
All man-made & chiefly man-made	535	764	- 30.0
Fabric, n.s.k.	348	1,387	- 74.9
By construction:			
Woven fabric Knit fabric	1,586	2,151	- 26.3

(continued)

Production of Specified Types of Boys' Wear—1978, 1979
(continued)

	(Thous. Units) 1979	(Thous. Units) 1978	% Change 1979/1978
Boys' Vests			
Boys' separate vests, excluding sweater vests	1,880	1,223	+ 53.7%
By fabric:			
All cotton & chiefly cotton	1,261	731	+ 72.5
All man-made & chiefly man-made	595	472	+ 26.1
All wool & chiefly wool All other fabric Fabric, n.s.k.	24	20	+ 20.0
By construction:			
Woven fabric Knit fabric	1,880	1,223	+ 53.7
Boys' Shirts & Sweaters			
Boys' dress shirts, including uniform	11,124	12,288	- 9.5
By fabric:			
All cotton & chiefly cotton	5,940	5,412	+ 9.8
All man-made & chiefly man-made	3,828	5,124	- 25.3
All other fabric Fabric, n.s.k.	1,356	1,752	- 22.6
By construction:			
Woven fabric	9,696	9,516	+ 1.9
Knit fabric	708	1,536	- 53.9
Construction, n.s.k.	720	1,236	- 41.7
Boys' woven sport shirts	22,128	22,752	- 2.7
All cotton & chiefly cotton	6,792	7,404	- 8.3
All man-made & chiefly man-made	14,724	13,836	+ 6.4
All wool & chiefly wool All other fabric Fabric, n.s.k.	612	1,512	- 59.5
Boys' knit sport shirts, except sweat shirts	136,848	148,104	- 7.6
By fabric:			
All cotton & chiefly cotton	62,808	70,572	- 11.0
All man-made & chiefly man-made	65,076	65,160	- 0.1
All other fabric	4,680	7,176	- 34.8
Fabric, n.s.k.	4,284	5,196	- 17.6
By type:			
Full open front shirts	5,808	9,036	- 35.7
Partial front opening	41,052	41,136	- 0.2
T-shirts made for outerwear, including tanktops	73,440	80,424	- 8.7
Type, n.s.k.	16,548	17,508	- 5.5

(continued)

Production of Specified Types of Boys' Wear—1978, 1979
(continued)

	(Thous. Units)		% Change
	1979	1978	1979/1978
Boys' sweaters, including sweater vests, knit cardigans & pullovers	6,384	7,272	- 12.7%
All man-made & chiefly man-made	5,100	6,144	- 17.0
All wool & chiefly wool	960	912	+ 5.3
All other fiber Fiber, n.s.k.	324	216	+ 50.0
Boys' Trousers, Jeans & Jean-Cut Casual Slacks			
Boys' separate dress & sport trousers, including uniform	20,962	27,492	- 23.8%
Woven fabric:			
All cotton & chiefly cotton	8,529	12,168	- 29.9
All man-made & chiefly man-made	10,428	12,947	- 19.5
All wool & chiefly wool All other fabric	287	289	- 0.7
Knit fabric:			
All cotton & chiefly cotton All man-made & chiefly man-made	1,718	2,088	- 17.7
Boys' jeans & dungarees	48,403	49,242	- 1.7
All cotton & chiefly cotton	41,496	42,518	- 2.4
All man-made & chiefly man-made	6,907	6,724	+ 2.7
Boys' jean-cut casual slacks	26,553	31,615	- 16.0
All cotton & chiefly cotton	21,857	23,697	- 7.8
All man-made & chiefly man-made	4,696	7,918	- 40.7
Boys' shorts, except athletic shorts	5,845	8,993	- 35.0
By fabric:			
All cotton & chiefly cotton	4,935	5,859	- 15.8
All man-made & chiefly man-made	618	2,730	- 77.4
Fabric, n.s.k.	292	404	- 27.7
By construction:			
Woven fabric Knit fabric	5,845	8,993	- 35.0
Boys' coveralls, overalls, work pants & jumpsuits	7,560	9,156	- 17.4
Boys' nontailored heavy outer jackets except ski	5,112	6,384	- 19.9
By construction:			
Woven fabric	4,872	6,168	- 21.0
Knit fabric	240	216	+ 11.1

(continued)

Boys' Wear

Production of Specified Types of Boys' Wear—1978, 1979
(continued)

	(Thous. Units)		% Change
	1979	1978	1979/1978
Boys' nontailored heavy outer jackets except ski (continued)			
By fabric:			
All cotton & chiefly cotton	840	1,920	- 56.3%
All man-made & chiefly man-made	3,576	2,808	+ 27.4
All wool & chiefly wool All other fabric	696	1,656	- 58.0
Boys' nontailored light outer jackets	4,884	7,284	- 32.9
By construction:			
Woven fabric Knit fabric	4,884	7,284	- 32.9
By fabric:			
All cotton & chiefly cotton	1,332	1,524	- 12.6
All man-made & chiefly man-made	3,192	5,376	- 40.6
All wool & chiefly wool All other fabric	360	384	- 6.3
Boys' Underwear & Nightwear			
Boys' pajamas & other nightwear, excluding robes	16,380	15,324	+ 6.9
By construction:			
Woven fabric	5,580	7,968	- 30.0
Knit fabric	10,800	7,356	+ 46.8
By fabric:			
All cotton & chiefly cotton	6,504	8,052	- 19.2
All man-made & chiefly man-made All other fabric	9,876 na	7,272	na
Woven boxer shorts (boys'):	1,272	1,716	- 25.9
Cotton/polyester blended fabric All cotton & all other cotton blends	1,272	1,716	- 25.9
Knit underwear:			
Boys' lightweight undershirts with ¼ sleeve, excl. T-shirts made for outerwear	79,512	82,428	- 3.5
Cotton/polyester blended fabric	40,788	39,564	+ 3.1
All cotton & all other cotton blends	37,188	41,640	- 10.7
All other fabric Fabric, n.s.k.	1,536	1,224	+ 25.5

(continued)

Production of Specified Types of Boys' Wear—1978, 1979
(continued)

	(Thous. Units)		% Change
	1979	1978	1979/1978
Knit underwear: (continued)			
Boys' supporter-type knit briefs	116,472	113,952	+ 2.2%
Cotton/polyester blended fabric	39,108	39,696	- 1.5
All cotton & all other cotton blends	77,364	74,256	+ 4.2

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel MA-23A(79-1).

National Association of Hosiery Manufacturers, 1979 Hosiery Statistics.

Production of Boys' Wear by Fabric & Construction—1978, 1979
(Percent Distribution)

	Percent	
	1979	1978
Boys' Tailored Clothing		
Boys' suits, except wash & leisure suits, including uniform suits, total	100.0%	100.0%
By fabric:		
All wool & wool blends	4.5	3.9
Fabrics other than above	95.5	96.1
Boys' tailored suit-type dress & sport coats, including uniform, total	100.0%	100.0%
By fabric:		
All wool & wool blends	30.4	24.4
Fabrics other than above	59.6	75.6
Boys' dress & sport trousers, including uniform, total	100.0%	100.0%
By fabric:		
All wool & wool blends	1.4	1.1
All cotton & cotton blends (with other than wool)	40.7	44.3
Fabrics other than above	49.7	47.1

(continued)

PRODUCTION

Boys' Wear

Production of Boys' Wear by Fabric & Construction—1978, 1979
(Percent Distribution)
(continued)

	Percent	
	1979	1978
Boys' Furnishings, Work Clothing, Nontailored Sportswear		
Boys' dress shirts, including uniform, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	53.3	44.0
Fabric other than above	34.4	41.7
Fabric, n.s.k.	12.2	14.3
Boys' sport shirts, except knit outerwear sport shirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	30.7	32.6
All man-made & chiefly man-made	66.5	60.8
All wool & chiefly wool & fabric, n.s.k.	2.8	6.6
Boys' jean-cut casual slacks, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	82.3	75.0
Fabric other than above	17.7	25.0
Boys' nontailored heavy outer jackets, except ski, total	100.0%	100.0%
By fabric:		
All wool & wool blends	13.6	26.8
All cotton & cotton blends	16.4	31.1
Fabric other than above	70.0	45.5
Boys' nontailored light outer jackets, total	100.0%	100.0%
By fabric:		
All cotton & cotton blends	27.2	20.9
All wool & wool blends	7.3	5.3
Fabric other than above	65.3	73.8
Boys' swimsuits, total*	100.0%	100.0%
By construction:		
Knit fabric	74.1	72.6
Woven fabric	25.9	27.4
Boys' Knit Outerwear		
Boys' sweaters, knit cardigans & pullovers, total	100.0%	100.0%
By fabric:		
All wool & chiefly wool	15.0	12.5
All man-made & chiefly man-made	85.0	87.5

(continued)

Boys' Wear

Production of Boys' Wear by Fabric & Construction—1978, 1979
(Percent Distribution)
(continued)

	Percent	
	1979	1978
Boys' Knit Outerwear (continued)		
Boys' knit outerwear sport shirts, excluding sweat shirts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	45.9	47.7
All man-made & chiefly man-made (nylon, acrylic, rayon, etc.)	47.6	44.0
Fabric, n.s.k.	6.5	8.3
Boys' Underwear & Nightwear		
Boys' pajamas, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	39.7	52.5
Fabric other than above	60.3	47.5
By construction:		
Woven fabric	34.1	52.0
Knit fabric	65.9	48.0
Boys' knit underwear:		
Boys' lightweight with ¼ sleeve, including T-shirt used as undershirt, total	100.0%	100.0%
By fabric:		
Cotton/polyester blends	51.2	48.0
All cotton & all other cotton blends	46.7	50.5
Fabric, n.s.k.	2.1	1.5
Boys' briefs, supporter-type, total	100.0%	100.0%
By fabric:		
Cotton/polyester blends	33.6	34.8
All cotton & all other cotton blends	66.4	65.2

n.s.k. = not specified by kind
*Boys' wear items are combined with statistics on men's wear.

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Apparel, 1979 MA-23A(79)-1, (Issued December 1980).

MATERIALS CONSUMED IN PRODUCTION

The figures for the materials used in the consumption section of this report are supplied by the National Cotton Council of America. These figures may conflict with Census Bureau figures for the same items published in other sections of this Fact File.

Children's & Girls' Wear

Total Fiber Consumption in the Production of Girls', Children's & Infants' Wear—1978, 1979

	Total Production (1,000 Dozen)		Total Fiber Consumed (1,000 Pounds)		% Cotton*	
	1979(e)	1978(r)	1979(e)	1978(r)	1979(e)	1978(r)
Girls', children's & infants' apparel	na	na	385,840	376,632	37%	38%
Knit	na	na	234,120	225,194	29	30
Woven	na	na	151,720	151,438	52	52
Blouses & shirts	16,363	16,445	48,681	48,881	58	59
Knit	13,908	13,756	41,795	41,338	61	61
Woven	2,455	2,689	6,886	7,543	42	42
Coats	393	405	6,610	6,810	19	21
Knit	43	45	997	1,042	8	9
Woven	350	360	5,613	5,768	21	23
Jackets	750	731	6,794	6,650	28	27
Knit	256	255	3,175	3,163	17	17
Woven	494	476	3,619	3,487	38	37
Ski & snow suits & coat-leggings sets	281	282	4,068	4,089	11	14
Knit	154	155	3,275	3,296	12	15
Woven	127	127	793	793	9	9
Dresses	5,872	5,931	34,389	34,424	31	32
Knit	1,585	1,521	13,788	13,232	18	18
Woven	4,287	4,410	20,601	21,192	42	43
Nightgowns	2,684	2,535	14,991	14,150	--	2
Knit	2,013	1,839	11,301	10,325	--	--
Woven	671	696	3,690	3,825	--	--
Pajamas	5,448	5,210	36,309	34,717	--	3
Knit	4,685	4,436	31,359	29,695	--	--
Woven	763	774	4,950	5,022	--	3
Play garments	9,928	9,733	41,043	40,211	55	56
Knit	4,368	4,224	18,976	18,349	53	54
Woven	5,560	5,509	22,067	21,862	56	57

(continued)

Children's & Girls' Wear

Total Fiber Consumption in the Production of Girls', Children's & Infants' Wear—1978, 1979
(continued)

	Total Production (1,000 Dozen)		Total Fiber Consumed (1,000 Pounds)		% Cotton*	
	1979(e)	1978(r)	1979(e)	1978(r)	1979(e)	1978(r)
Rainwear, woven	30	29	435	421	37%	42%
Robes & housecoats	262	262	3,723	3,699	--	3
Knit	55	58	669	698	--	#
Woven	207	204	3,054	3,001	--	3
Skirts	583	561	4,044	3,900	35	34
Knit	99	112	721	817	13	13
Woven	484	449	3,323	3,083	40	40
Slacks	4,973	4,875	27,567	27,001	40	41
Knit	2,039	2,027	10,422	10,360	17	21
Woven	2,934	2,848	17,145	16,641	56	56
Dungarees & jeans, woven	2,769	2,637	25,544	24,327	80	82
Suits, excl. ski & snow	444	493	5,591	6,206	39	42
Knit	35	39	363	405	15	17
Woven	409	454	5,228	5,801	41	44
Sweaters & jerseys, knit	1,049	1,071	5,672	5,791	8	9
Swim suits	1,037	978	4,541	4,260	17	19
Knit	653	600	3,199	2,939	6	7
Woven	384	378	1,342	1,321	49	52
Underwear	21,578	20,853	24,782	24,005	61	62
Knit	20,112	19,444	23,212	22,483	62	63
Woven	1,466	1,409	1,570	1,522	53	54

(e) = estimated
(r) = revised
na = not available
# = Less than 0.5%

*Percentage of total material consumption accounted for by cotton at the raw fiber (bale) level. "Percent Cotton" in this table represents a weighted calculation involving (1) 100% cotton materials, plus (2) cotton content of blends and mixtures.

Source: National Cotton Council of America, Cotton Counts Its Customers, (1980 Edition).

MATERIALS CONSUMED IN PRODUCTION

Boys' Wear

Total Fiber Consumption in the Production of Boys' Wear—1978, 1979

	Total Production (1,000 Dozen)		Total Fiber Consumed (1,000 Pounds)		% Cotton*	
	1979(e)	1978(r)	1979(e)	1978(r)	1979(e)	1978(r)
Boys' apparel, total	na	na	280,138	257,261	45%	47%
Knit	na	na	109,652	112,789	42	44
Woven	na	na	170,486	114,472	47	62
Athletic shorts & uniforms						
Woven shorts	1,071	1,179	4,199	4,622	42	48
Coats & jackets, excl. leather, total	1,573	1,585	18,275	18,466	--	--
Overcoats & topcoats, total	49	52	1,349	1,427	21	25
Knit	7	8	150	171	--	--
Woven	42	44	1,199	1,256	25	29
Dress & sports coats, total	304	301	3,218	3,194	12	14
Knit	106	114	1,179	1,268	--	--
Woven	198	187	2,039	1,926	22	24
Heavyweight jackets, total	532	537	7,479	7,549	33	33
Knit	27	27	443	443	--	--
Woven	505	510	7,036	7,106	35	35
Lightweight jackets, total	688	695	6,229	6,296	13	15
Knit	344	354	3,231	3,325	--	--
Woven	344	341	2,998	2,971	26	31
Pajamas & other nightwear, total	1,184	1,246	14,671	14,532	2	3
Knit	533	539	8,273	8,366	--	--
Woven	651	707	5,152	5,986	4	6
Rainwear, except plastic & rubberized						
Woven	19	19	430	430	29	29
Shirts, total	14,633	30,034	67,004	70,498	50	47
Dress & business, total	1,044	1,024	4,443	4,371	30	29
Knit	167	184	803	885	3	4
Woven	877	840	3,640	3,486	36	35

(continued)

MATERIALS CONSUMED IN PRODUCTION

Boys' Wear

Total Fiber Consumption in the Production of Boys' Wear — 1978, 1979
(continued)

	Total Production (1,000 Dozen)		Total Fiber Consumed (1,000 Pounds)		% Cotton*	
	1979(e)	1978(r)	1979(e)	1978(r)	1979(e)	1978(r)
Boys' apparel, total (continued)						
Shirts, total (continued)						
Sport, total	12,577	13,219	56,280	59,161	44%	48%
Knit	10,757	11,323	48,975	51,551	47	49
Woven	1,820	1,896	7,305	7,610	39	44
Sweat, knit	977	1,086	6,002	6,672	47	52
Work, woven	35	37	279	294	52	43
Suits, total	344	355	7,385	7,630	18	18
Knit	52	67	1,147	1,478	--	--
Woven	292	288	6,238	6,152	21	22
Sweaters, knit	576	606	4,320	4,545	5	6
Swimsuits, total	517	533	1,785	1,829	27	33
Knit	103	130	316	399	7	7
Woven	414	403	1,469	1,430	31	40
Trousers & shorts, total	10,829	17,653	129,944	103,376	60	58
Dress & sport trousers, total	2,113	2,178	17,928	18,479	40	40
Knit	106	109	915	941	--	--
Woven	2,007	2,069	17,013	17,538	42	42
Jeans, jean cut trousers, dungarees, etc., total	7,858	14,691	107,604	80,826	65	63
Knit	79	60	644	489	1	1
Woven	7,779	6,773	92,269	80,337	65	63
Outerwear shorts, total	840	764	4,311	3,848	35	37
Knit	252	206	1,129	923	1	1
Woven	588	558	3,082	2,925	48	48
Work trousers, excl. dungarees, etc., woven	18	20	201	223	43	44
Underwear, total	16,419	16,078	32,125	31,333	63	67
Shorts & briefs, knit	8,448	8,364	12,674	12,548	64	67

(continued)

MATERIALS CONSUMED IN PRODUCTION

Boys' Wear

Total Fiber Consumption in the Production of Boys' Wear—1978, 1979
(continued)

	Total Production (1,000 Dozen)		Total Fiber Consumed (1,000 Pounds)		% Cotton*	
	1979(e)	1978(r)	1979(e)	1978(r)	1979(e)	1978(r)
Boys' apparel, total (continued)						
Underwear, total (continued)						
Athletic (sleeveless) undershirts, knit	288	304	504	532	65%	69%
Lightweight T-shirts, knit	7,398	7,113	18,502	17,789	63	67
Woven undershorts	285	297	445	464	49	57

(e) = estimated
(r) = revised
*Percentage of total material consumption accounted for by cotton at the raw fiber (bale) level. "Percent Cotton" in this table represents a weighted calculation involving (1) 100% cotton materials, plus (2) cotton contents of blends and mixtures.

Source: National Cotton Council of America, Cotton Counts Its Customers, (1980 Edition).

SHIPMENTS

Every five years the U.S. Bureau of the Census compiles a complete census of all U.S. manufacturers, the latest of which covers the year 1977. In interim years, the Bureau conducts an annual survey of manufactures, which yields industry data based on a probability sample. Data from the 1978 survey has been adjusted by the Census Bureau for comparability with the 1977 data.

In many product categories, value of shipment data for children's items has been combined with information on men's and/or women's wear. However, separate figures have been published on the value of shipments by all manufacturers in the U.S. in the product categories noted below.

(continued)

Value of Shipments By All U.S. Producers Of Specified Categories of Boys' & Girls' Wear—1977, 1978

	Millions of $		% Change
	1978	1977	1978/1977
Boys' suits, coats & tailored jackets	$158.1	$149.7	+ 5.6%
Children's dresses & blouses	890.8	839.1	+ 6.2
Knit sport shirts	187.6	176.1	+ 6.5
Contract work on dresses & shirts	155.0	134.5	+15.2
Dresses & blouses, n.s.k.	548.1	528.5	+ 3.7
Children's coats & suits	216.6	191.5	+12.8
Contract work on coats & suits	15.7	17.9	-12.3
Coats, jackets, suits, snowsuits	200.4	173.6	+15.4
Children's outerwear, n.e.c.	703.6	765.9	- 8.1
Contract work on outerwear, n.e.c.	84.6	80.0	+ 5.7

n.s.k. = not specified by kind
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census, 1978 Annual Survey of Manufactures & 1977 Census of Manufactures (M78(AS)-2).

In addition to the two sources of information noted above, the U.S. Bureau of the Census publishes an annual report on production and value of shipments for a detailed list of apparel categories. These reports are based on a sample survey of manufacturers which excludes small firms, which are, however, covered in the above data.

Information from the sample surveys covered in the Current Industrial Reports series follows.

Children's & Girls' Wear

According to the U.S. Bureau of the Census' Current Industrial Reports, the value of identified categories of children's wear shipments for 1979 amounted to $2,108.4 million, an increase of 2.1% over the previous years' $2,065.0 million. Excluded from these totals is the value of shipments of children's wear, not separately reported, but combined with women's wear. (See Women's Wear Fact Files.)

Dress shipments valued at $388.3 million represented 18.4% of all industry shipments, more than any other single category. Second in rank to dresses was knit outerwear sport shirts accounting for 13.8% with $290.8 million. Third position was held by infants' playgarments, including creepers and rompers. This category captured $199.6 million or 9.5%.

A majority of the reported categories registered increases in 1979 vs. 1978. The largest of these increases was in the slips, vests, undershirts and other underwear except panties group which climbed 29.7% to $69.5 million during this period. The raincoat category rose 18.2% to $5.2 million while the vest group showed a 15.4% rise to $6.0 million. The two preceding categories showed the second and third largest increases between 1978 and 1979, respectively.

(continued)

Children's & Girls' Wear (continued)

Of the categories that did decrease, the biggest slide was registered in the play-garments, including playsuits and halter tops area. This group declined from $103.1 million in 1978 to $74.7 million in 1979, a loss of 27.5%. The only other reported groups to decline between 1978 and 1979 were nightgowns, pajamas and robes which slid 11.6%, 10.4% and 5.3% to $63.1 million, $145.7 million and $28.8 million, respectively.

Value of Shipments of Specified Types of Girls', Children's Toddlers' & Infants' Wear—1978, 1979

	(Million $)		% Change
	1979	1978	1979/1978
Girls', Children's, Toddlers' & Infants' (reported categories), total	$2,108.4	$2,065.0	+ 2.1%
Dresses, total	388.3	355.5	+ 9.2
Girls', subteen & teenage	164.8	152.9	+ 7.8
Children's	150.4	148.1	+ 1.6
Infants' & toddlers'	73.1	54.5	+ 34.1
Blouses (excl. knit outerwear sport shirts), total	142.4	137.7	+ 3.4
Girls', subteen & teenage	91.3	88.8	+ 2.8
Children's, infants' & toddlers'	51.1	48.9	+ 4.5
Knit outerwear sport shirts, excl. sweat shirts, total	290.8	276.6	+ 5.1
Girls', subteen & teenage	56.4	56.6	- 0.4
Children's	158.0	141.7	+ 11.5
Infants' & toddlers'	76.4	78.3	- 2.4
Girls', children's & infants' sweaters, incl. sweater vests, total	49.9	48.0	+ 4.0
Coats, excl. coat & leggings sets, total	55.5	52.0	+ 6.7
Girls', subteen & teenage	30.2	30.6	- 1.3
Children's & infants'	25.3	21.4	+ 18.2
Coat & leggings sets, coat & snow pants sets & ski & snow suits, total	35.1	35.4	- 0.8
Raincoats and rain caps, total	5.2	4.4	+ 18.2
Jackets, total	37.3	40.1	- 7.0
Vests, total	6.0	5.2	+ 15.4
Suits, total	29.6	28.0	+ 5.7

(continued)

SHIPMENTS

Children's & Girls' Wear

Value of Shipments of Specified Types of Girls', Children's Toddlers' & Infants' Wear—1978, 1979
(continued)

	(Million $) 1979	(Million $) 1978	% Change 1979/1978
Girls', children's, toddlers' & infants' wear (reported categories), total (continued)			
Skirts, total	$ 44.7	$ 41.2	+ 8.5%
Slacks, incl. jean-cut casual, total	149.9	147.1	+ 1.9
Girls', subteen & teenage	74.8	79.4	- 5.8
Children's & infants'	75.1	67.7	+ 10.9
Jeans & dungarees, total	115.4	113.8	+ 1.4
Girls', subteen & teenage	48.4	49.8	- 2.8
Children's & infants'	67.0	64.0	+ 4.7
Shorts, total	43.6	42.3	+ 3.1
Girls', subteen & teenage	13.4	11.2	+ 19.6
Children's & infants'	30.2	31.1	- 2.9
Playgarments, incl. playsuits, halter tops, total	74.7	103.1	- 27.5
Girls', subteen & teenage	9.9	11.5	- 13.9
Children's & infants'	64.8	81.6	- 20.6
Playgarments, incl. creepers & rompers, infants', total	199.6	192.0	+ 4.0
Nightgowns, total	63.1	71.4	- 11.6
Girls' & children's	41.1	44.6	- 7.8
Infants' & toddlers'	22.0	26.8	- 17.9
Pajamas, incl. heavyweight sleeping garments made with feet, total	145.7	162.6	- 10.4
Girls' & children's	66.6	69.9	- 4.7
Infants' & toddlers'	79.1	92.7	- 14.7
Robes, total	28.8	30.4	- 5.3
Panties, incl. pettipants, total	87.0	84.3	+ 3.2
Girls' & children's	53.2	53.4	- 0.4
Infants' & toddlers'	33.8	30.9	+ 9.4
Slips, vests, undershirts & other underwear, except panties, total	69.5	53.6	+ 29.7
Girls' & children's	27.9	22.8	+ 22.4
Infants' & toddlers'	41.6	30.8	+ 35.1

(continued)

Children's & Girls' Wear

Value of Shipments of Specified Types of Girls', Children's Toddlers' & Infants' Wear—1978, 1979 (continued)

	(Million $) 1979	(Million $) 1978	% Change 1979/1978
Girls', children's, toddlers' & infants' wear (reported categories), total (continued)			
Swimsuits, total	$ 46.3	$ 40.3	+ 14.9

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel, 1979, Series MA-23A(79)1.

Boys' Wear

The U.S. Census Bureau reported a total of $1.6 billion in boys' wear shipments in 1979, an increase of 0.6% over 1978. Excluded from this total is the value of shipments of boys' wear not separately reported but combined with men's wear.

Knit sport shirts, except sweat shirts, accounted for the greatest share of these shipments, $325.8 million or 20.2%. Following closely behind in importance were jeans and dungarees which represented 18.2% of shipments, $294.1 million. Third place was captured by jean-cut casual slacks, which held the number one position in 1977. This group was valued at $185.3 million and totaled 11.5% of shipments. Combined, these three classes accounted for almost half of the industries shipments during 1979.

Most categories registered increases during 1979, the largest by separate vests, which skyrocketed 71.2% to $10.1 million between 1978 and 1979. More modest gains of 18.6% and 16.6% were recorded by tailored suit-type dress and sport coats, including uniforms and woven sport shirts. These two categories rose to $30.0 million and $97.4 million, respectively, during the period.

The largest declines were registered by the shorts, except athletic, nontailored light outer jackets and boxer shorts groups. These product classes slid 24.9%, 23.8% and 23.8% to $17.8 million, $28.8 million and $1.6 million, respectively, over the year.

SHIPMENTS

Boys' Wear

Value of Shipments of Boys' Wear Items—1978, 1979

	Millions of $		% Change
	1979	1978	1979/1978
Boys' wear, total of categories specified below	$1,614.9	$1,605.7	+ 0.6%
Tailored suits, including uniform	97.6	96.8	+ 0.8
Overcoats, topcoats & tailored suburban & car coats, including uniform	10.2	10.6	- 3.8
Tailored suit-type dress & sport coats, including uniform	30.0	25.3	+18.6
Casual (nontailored) sport coats & jackets	15.5	17.2	- 9.9
Separate vests, excluding sweater vests	10.1	5.9	+71.2
Dress shirts, including uniform	44.2	46.8	- 5.5
Woven sport shirts	97.4	83.5	+16.6
Knit sport shirts, except sweat shirts	325.8	312.9	+ 4.1
Sweaters including sweater vests, knit cardigans & pullovers	25.9	29.2	+11.3
Separate dress & sport trousers, including uniform	117.2	135.9	-13.8
Jeans & dungarees	294.1	275.0	+ 6.9
Jean-cut casual slacks	185.3	199.6	- 7.2
Shorts, except athletic shorts	17.8	23.7	-24.9
Nontailored heavy outer jackets except ski	59.5	64.7	- 8.0
Nontailored light outer jackets	28.8	37.8	-23.8
Coveralls, overalls, work pants & jumpsuits	45.9	45.1	+ 1.8
Pajamas & other nightwear, excluding robes	67.7	59.8	+13.2
Boxer shorts	1.6	2.1	-23.8
Lightweight undershirts with ¼ sleeve, excluding T-shirts made for outerwear	66.0	65.0	+ 1.5
Supporter-type knit briefs	74.3	68.8	+ 8.0

Source: U.S. Department of Commerce,
Bureau of the Census,
Current Industrial Reports,
Apparel, MA-23A(79)-1.

SHIPMENTS

By Region

The children's wear industry is becoming less and less concentrated, attested to by the fact that data on shipments from many more states was made available in 1977 than in 1972.

In the children's knit sport shirt group, North Carolina was the dominant state in 1977, accounting for 15.5% of shipments. A close second to North Carolina was New York, whose importance to the group declined radically between 1972 and 1977. In 1972, New York States' $28.6 million represented almost one fourth of the category shipments but 1977's $27.0 million held only a 15.3% share of the market.

North Carolina also held the prime position for contract work shipments on children's apparel. The states' $38.3 million accounted for 21.3% of all children's wear contract work, reported by the U.S. Department of Commerce in the 1977 Census of Manufactures. The $37.7 million in contract work shipments from Pennsylvania ranked second with 20.9% of the market. Third and Fourth place were delegated to Virginia and New York with 13.3% and 12.3%, respectively.

Value of Shipments of Children's Apparel by All Producers By Geographic Area

	Millions of $		% of Total*
	1977	1972	1977
Children's knit sport shirts, U.S. total	$176.1	$115.3	100.0%
Middle Atlantic Division			
New York	27.0	28.6	15.3
Pennsylvania	6.4	na	3.6
South Atlantic Division			
North Carolina	27.3	na	15.5
Pacific Division			
California	12.5	na	7.1
Contract work on children's dresses & shirts, U.S. total	134.5	na	100.0
Middle Atlantic Division			
New York	12.4	na	9.2
New Jersey	5.9	na	4.4
Pennsylvania	28.5	na	21.2
South Atlantic Division			
Virginia	20.0	na	14.9
North Carolina	19.4	na	14.4
South Carolina	13.9	na	10.3
Florida	2.3	na	1.7
Pacific Division			
California	9.0	na	6.7

(continued)

SHIPMENTS

By Region

Value of Shipments of Children's Apparel by All Producers By Geographic Area

	Millions of $		% of Total*
	1977	1972	1977
Contract work on children's coats & suits, U.S. total	17.9	na	100.0%
Middle Atlantic Division			
New Jersey	4.2	na	23.5
Pennsylvania	3.0	na	16.8
South Atlantic Division			
North Carolina	2.3	na	12.8
Georgia	2.1	na	11.7
Contract work on children's outerwear, n.e.c., U.S. total	80.0	na	100.0
New England Division			
Massachusetts	10.0	na	12.5
Middle Atlantic Division			
New York	9.7	na	12.1
New Jersey	6.8	na	8.5
Pennsylvania	6.2	na	7.8
South Atlantic Division			
Virginia	4.0	na	5.0
North Carolina	16.6	na	20.8
Pacific Division			
California	4.0	na	5.0

na = not available
n.e.c. = not elsewhere classified
*Percent distribution does not equal 100.0% due to disclosures. States with disclosures are not shown.

Source: U.S. Department of Commerce,
Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

THE MARKET FOR CHILDREN'S WEAR

Births

During 1980 there were an estimated 3,598,000 live births in the U.S., nearly 4% more than in 1979. The birthrate was 16.2 live births per 1,000 population, and the fertility rate was 69.2 live births per 1,000 women aged 15-44 years. The birthrate was 3% higher and the fertility rate was 2% higher in 1980 than in 1979.

The increase in the number of births and the birthrate in 1980 is the result of the continued growth in the number of women in the childbearing ages as well as the increase in the rate of childbearing. The number of women in the childbearing ages increased 2% between 1979 and 1980, and, according to projections prepared by the U.S. Bureau of the Census, the number of these women will increase slightly more than 1% annually between 1980 and 1985. Therefore, the number of births will continue to increase unless there are offsetting declines in age-specific birthrates.

Live Births in the U.S., Birthrates & Fertility Rates, 1970-1980

Year	Number (thous.)	Birthrate*	Fertility Rate**
1980(p)	3,598.0	16.2	69.2
1979(p)	3,473.0	15.8	68.0
1978	3,333.3	15.3	66.6
1977	3,326.6	15.4	67.8
1976	3,167.8	14.8	65.8
1975	3,144.2	14.8	66.7
1974	3,160.0	14.9	68.4
1973	3,137.0	14.9	69.2
1972	3,258.4	15.6	73.4
1971	3,556.0	17.2	81.8
1970	3,731.4	18.4	87.9

(p) = provisional
*Live births per 1,000 population
**Live births per 1,000 women aged 15-44 years

Source: U.S. Dept. of Health & Human Services,
National Center for Health Statistics.

Youth Population

The number of boys and girls, five years of age and younger, will increase by 14.1% by the year 2000 over the 1979 total, making this the fastest growing children's group through that year, according to the U.S. Bureau of the Census Series II projections of the population (which assume a fertility rate of 2.1% or at the replacement level).

The number of youths between the ages of 10 and 16 will show a 9.6% decline through 1985 from the 1979 total, but gains will be registered by the year 2000 in this age group.

Youth Population

U.S. Male & Female Youth Population Through Age 16, 1979 & Projections to 2000 (Series II)

	U.S. Youth Population (Number in thous.)				% Change	Percent of total Population			
	1979	1985	1990	2000	2000/1979	1979	1985	1990	2000
Total, all ages	220,099	232,880	243,513	260,378	+ 18.3%	100.0%	100.0%	100.0%	100.0%
16 years & younger	58,394	58,800	61,560	65,030	+ 11.4	26.5	25.2	25.3	25.0
Male	29,816	30,086	31,540	33,333	+ 11.8	13.5	12.9	13.0	12.8
Female	28,578	28,714	30,020	31,697	+ 10.9	13.0	12.3	12.3	12.2
15 & 16 years	8,181	7,170	6,366	8,025	- 1.9	3.7	3.1	2.6	3.1
Male	4,177	3,659	3,259	4,113	- 1.5	1.9	1.6	1.3	1.6
Female	4,004	3,511	3,107	3,912	- 2.3	1.8	1.5	1.3	1.5
10 to 14 years	18,071	16,567	16,718	20,153	+ 11.5	8.2	7.1	6.9	7.7
Male	9,212	8,471	8,564	10,329	+ 12.1	4.2	3.6	3.5	4.0
Female	8,859	8,096	8,154	9,824	+ 10.9	4.0	3.5	3.4	3.7
5 to 9 years	16,493	16,260	19,040	19,000	+ 15.2	7.5	7.0	7.8	7.3
Male	8,424	8,324	9,754	9,738	+ 15.6	3.8	3.6	4.0	3.7
Female	8,069	7,936	9,286	9,262	+ 14.8	3.7	3.4	3.8	3.6
Under 5 years	15,649	18,803	19,437	17,852	+ 14.1	7.1	8.1	8.0	6.9
Male	8,003	9,632	9,963	9,153	+ 14.4	3.6	4.1	4.1	3.5
Female	7,646	9,171	9,474	8,699	+ 13.8	3.5	4.0	3.9	3.4

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-25,
No. 704 (July 1977).
No. 870, (January 1980).

Estimated Youth Population of the U.S. By Single Years of Age & By Sex, 1979

(Numbers in Thous.)

	1979 Total			1985 Total		
	Total	Male	Female	Total	Male	Female
Total, through 16	58,394	29,816	28,578	58,800	30,086	28,714
Under 5 years	15,649	8,003	7,646	18,803	9,632	9,171
Under 1 year	3,281	1,680	1,601	3,887	1,993	1,893
1 year	3,191	1,629	1,561	3,841	1,966	1,875
2 years	3,104	1,590	1,514	3,727	1,910	1,817
3 years	2,990	1,528	1,463	3,699	1,895	1,804
4 years	3,084	1,576	1,508	3,650	1,868	1,782
5 to 9 years	16,493	8,424	8,069	16,260	8,324	7,936
5 years	3,010	1,541	1,468	3,493	1,790	1,702
6 years	3,102	1,581	1,521	3,355	1,715	1,640
7 years	3,298	1,683	1,651	3,254	1,655	1,579
8 years	3,558	1,820	1,738	3,100	1,587	1,513
9 years	3,525	1,799	1,726	3,078	1,577	1,501
10 to 14 years	18,071	9,212	8,859	16,567	8,471	8,096
10 years	3,581	1,828	1,754	3,255	1,666	1,589
11 years	3,416	1,744	1,672	3,067	1,570	1,496
12 years	3,525	1,797	1,728	3,163	1,617	1,546
13 years	3,632	1,850	1,782	3,354	1,711	1,643
14 years	3,917	1,993	1,923	3,728	1,907	1,822
15 & 16 years	8,181	4,177	4,004	7,170	3,659	3,511
15 years	4,080	2,085	1,995	3,644	1,861	1,783
16 years	4,100	2,092	2,009	3,526	1,798	1,728

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 870.

Youth Population of the U.S. by Size of Family, 1979

	Total (Numbers in Thous.)	Percent
All Families	57,804	100.0%
No children under 18	27,433	47.5
With children under 18	30,371	52.5
1 child under 18	11,882	20.6
2 children under 18	11,005	19.0
3 children under 18	4,913	8.5
4 children under 18	1,745	3.0
5 children under 18	549	1.0
6 or more children under 18	249	0.5
No children under 6	44,801	77.5
With children under 6	13,003	22.5
1 child under 6	9,053	15.7
2 children under 6	3,449	6.0
3 children under 6	438	0.8
4 or more children under 6	63	0.1
No children under 3	50,008	86.5
With children under 3	7,796	13.5
1 child under 3	6,857	11.9
2 children under 3	898	1.6
3 or more children under 3	41	0.1

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 352 (July 1980).

Youth Population of the U.S. by State, 1979

(Numbers in Thous.)

	Resident Population	Under 5 years	5 to 17 years	17 years & younger	% of 17 & younger
United States, total	220,099	15,649	46,922	62,571	100.0%
Regions:					
Northeastern States	49,002	2,977	10,181	13,158	21.0
North Central States	58,406	4,131	12,692	16,823	26.9
The South	71,550	5,347	15,471	20,818	33.3
The West	41,142	3,194	8,578	11,772	18.8
Northeast:					
New England	12,291	722	2,575	3,297	5.3
Middle Atlantic	36,711	2,255	7,606	9,861	15.8

(continued)

Youth Population of the U.S. by State, 1979

(Numbers in Thous.)

(continued)

	Resident Population	Under 5 years	5 to 17 years	17 years & younger	% of 17 & younger
North Central:					
East North Central	41,287	2,917	9,079	11,996	19.2%
West North Central	17,118	1,213	3,613	4,826	7.7
South:					
South Atlantic	34,976	2,414	7,348	9,762	15.6
East South Central	14,105	1,083	3,135	4,218	6.7
West South Central	22,470	1,850	4,988	6,838	10.9
West:					
Mountain	10,673	967	2,370	3,337	5.3
Pacific	30,469	2,227	6,209	8,436	13.5
New England:					
Maine	1,097	77	241	318	0.5
New Hampshire	887	60	193	253	0.4
Vermont	493	34	109	143	0.2
Massachusetts	5,769	323	1,193	1,516	2.4
Rhode Island	929	53	193	246	0.4
Connecticut	3,115	175	645	820	1.3
Middle Atlantic:					
New York	17,648	1,087	3,663	4,750	7.6
New Jersey	7,332	452	1,548	2,000	3.2
Pennsylvania	11,731	716	2,395	3,111	5.0
East North Central:					
Ohio	10,731	746	2,339	3,085	4.9
Indiana	5,400	393	1,201	1,594	2.5
Illinois	11,229	806	2,426	3,232	5.2
Michigan	9,207	651	2,086	2,737	4.4
Wisconsin	4,720	321	1,027	1,348	2.2
West North Central:					
Minnesota	4,060	285	883	1,108	1.8
Iowa	2,902	203	619	822	1.3
Missouri	4,867	334	1,009	1,343	2.1
North Dakota	657	52	144	196	0.3
South Dakota	689	55	150	205	0.3
Nebraska	1,574	116	333	449	0.7
Kansas	2,369	170	475	645	1.0

(continued)

Youth Population of the U.S. by State, 1979
(Numbers in Thous.)
(continued)

	Resident Population	Under 5 years	5 to 17 years	17 years & younger	% of 17 & younger
South Atlantic:					
Delaware	582	40	125	165	0.3%
Maryland	4,148	255	893	1,118	1.8
District of Columbia	656	39	129	168	0.3
Virginia	5,197	342	1,097	1,439	2.3
West Virginia	1,878	142	397	539	0.9
North Carolina	5,606	399	1,214	1,613	2.6
South Carolina	2,932	234	672	906	1.4
Georgia	5,117	396	1,160	1,556	2.5
Florida	8,860	566	1,660	2,226	3.6
East South Central:					
Kentucky	3,527	271	770	1,041	1.7
Tennessee	4,380	313	933	1,246	2.0
Alabama	3,769	284	841	1,125	1.8
Mississippi	2,429	213	591	804	1.3
West South Central:					
Arkansas	2,180	168	471	639	1.0
Louisiana	4,018	342	952	1,294	2.1
Oklahoma	2,892	221	594	815	1.3
Texas	13,380	1,119	2,971	4,090	6.5
Mountain:					
Montana	786	63	173	236	0.4
Idaho	905	90	203	293	0.6
Wyoming	450	42	97	139	0.2
Colorado	2,772	217	583	800	1.3
New Mexico	1,241	112	294	406	0.6
Arizona	2,450	215	538	753	1.2
Utah	1,367	174	331	505	0.8
Nevada	702	55	152	207	0.3
Pacific:					
Washington	3,926	281	815	1,096	1.8
Oregon	2,527	190	509	699	1.1
California	22,694	1,636	4,853	6,219	9.9
Alaska	406	43	103	146	0.2
Hawaii	915	76	198	274	0.4

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-25,
No. 875 (January 1980).

RETAIL SALES

In 1972-1973 the U.S. Bureau of Labor Statistics conducted quarterly interview surveys to develop information on consumer expenditures as a basis for revising the Consumer Price Index.

Reported patterns in annual spending for boys', girls', children's and infants' wear, together with 1978 data on personal consumption expenditures compiled by the U.S. Bureau of Labor Statistics, have been drawn on to develop the following estimates on expenditures. The dollar estimates represent the value at retail of all merchandise reaching consumers, including through other than normal retail channels—such as direct purchases from non-retailers (manufacturers, wholesalers), clothing supplied by institutions, etc.

Estimated Personal Consumption Expenditures, 1978
(Millions of Dollars)

Total, boys', girls', children's	$16,265
Boys' wear (2 - 15 years of age)	5,853
Coats, including all-weather coats	369
Heavy & lightweight outerjackets	386
Sweaters	135
Snow/ski suits, plastic raincoats	59
Suits, vests, sport coats, jackets	380
Dress & casual slacks, pants	795
Jeans, dungarees, work pants, shorts	990
Swimwear, beachwear, special sports clothing, n.e.c.	550
Shirts (dress, sport, work), tops	1,071
Underwear	398
Nightwear, robes	176
Hosiery	275
Hats, gloves, accessories, total	269
Hats, caps, etc.	35
Gloves, mittens	58
Small leather goods, ties, other accessories	176
Girls' wear (2 - 15 years of age)	7,220
Coats, including all-weather coats	715
Heavy & lightweight outerjackets	217
Sweaters	224
Snow/ski suits, plastic raincoats, jackets	87
Dresses, jumpers	722
Suits, pantsuits	448
Shirts, blouses, tops	1,054
Jeans, pants, skirts, shorts, vests	1,575
Uniforms & other special clothing	108
Swimwear, beachwear, special sports clothing, n.e.c.	396
Innerwear	462
Nightwear, robes	318
Hosiery, tights, leotards, etc.	476
Hats, gloves, accessories, total	418
Hats, caps, etc.	36
Gloves, mittens	43
Other accessories, small leather goods, handbags, etc.	339

(continued)

Estimated Personal Consumption Expenditures, 1978
(Millions of Dollars)
(continued)

Total, boys', girls', children's	
Children's wear (under 2 years of age)	$ 3,192
Outerwear	651
Diapers - disposable	744
Diapers, washable; booties, socks	587
Layettes, etc.	1,210

n.e.c. = not elsewhere classified

Source: Estimates by Fairchild Market Research Division based on U.S. Bureau of Labor Statistics report on Consumer Expenditure Survey: 1972-1973 (Bulletin 1997) and U.S. Department of Commerce report on personal consumption expenditures (Survey of Current Business, July 1979).

The Market Research Corporation of America and CSA Research also estimated sales of infants' and boys' wear by type. Their results are summarized in the following tables.

Amount of Money Spent on Infants' Wear by Type
(Millions of Dollars)

	1980		1976		% Change
	Total	% of Total	Total	% of Total	1980/1976
Nightwear	$204.8	23.4%	$122.7	22.7%	+ 66.9
Tops	130.4	14.9	77.8	14.4	+ 67.6
Bottoms	111.2	12.7	57.8	10.7	+ 92.4
Outerwear	56.9	6.5	34.0	6.3	+ 67.3
Underwear	55.1	6.3	36.7	6.8	+ 50.1
Sweaters and swimsuits	41.1	4.7	24.9	4.6	+ 55.1
Socks	41.1	4.7	26.5	4.9	+ 65.1
All other	234.7	26.8	160.6	29.7	+ 46.1
Total	875.3	100.0	540.6	100.0	+ 61.9

Source: Chain Store Age, Based on Data from Market Research Corporation of America and CSA Research, April 1981.

Amount of Money Spent on Boys' Wear by Type, 1979
(Millions of Dollars)

	Total	% of Total
Casual pants & jeans	$1,349.4	27.0%
Sport shirts & tops	1,092.3	21.9
Outerwear	480.1	9.6
Slacks & shorts	417.6	8.4
Underwear	328.3	6.6
Sweaters & bathing suits	323.4	6.5
Pj's & bathrobes	314.0	6.3
Socks	296.8	5.9
Suits & sportcoats	256.6	5.1
Dress shirts	133.3	2.7
TOTAL	4,991.8	100.0

Source: Chain Store Age, Based on Data from Market Research Corporation of America and CSA Research, October 1980.

By Store Type

According to the latest official data on retail sales by type of outlet, reported in the 1977 Census of Retail Trade, infants' and toddlers' wear reached $2.5 billion, girls' and subteen's wear amounted to over $1.9 billion and boys' and young mens' totaled about $3.9 billion in sales through retail outlets with payrolls in 1977.

During 1977, department stores took the major share of the reported sales pie, accounting for 64% of the infants' and girls' wear and 70% of boys' wear volume. This compares with 1972's market shares of 60% and 58%, respectively, for these same stores. This rise was due mainly to a huge campaign by large chains, such as Sears, Ward and Penney, to capture this highly profitable market.

Children's wear captured 17.7% of demand in the women's and children's wear departments of department stores; while representing 14.7% and 3.7% of sales of this same department in family clothing stores and women's ready-to-wear stores, respectively, according to figures released by the U.S. Bureau of the Census in the 1977 Census of Retail Trade. Boys' and young men's wear represented 25.9% of men's and boys' wear sales in department stores. This group also accounted for 14.6% of men's and boys' wear sales in family clothing stores and 6.0% of the sales in men's and boys' wear stores.

The gift market represents a sizable portion of spending for children's wear. In the analysis of consumer expenditures in 1972-1973, conducted by the U.S. Bureau of Labor Statistics, gifts for persons not in the family represented 8.3% of total spending for boys' wear, 8.6% of the spending for girls' wear, and 31.1% of spending for children's wear (children under 2 years of age).

The retail market for boys' wear climbed to an estimated $5 billion in 1979, according to Chain Store Age, October 1980. In terms of real dollars, this was only a 5.9% increase over 1975, taking into consideration that inflation for men's/boys' wear was 17.1% for the period, according to the Bureau of Labor Statistics.

(continued)

By Store Type (continued)

Salomon Associates reports in the January 1981 issue of Chain Store Age that the children's wear market is staying with the "preppy" look. Thanks to this image and the shift in demographics, which has revived the 0 to 6x size ranges, sales of children's wear are heaviest during the Christmas season and in the month of August when consumers are making "back-to-school" purchases.

Retail Sales of Specified Boys' & Children's Wear Categories
By Type of Retail Outlet, 1977
(Includes only stores with payroll)

	Infants'/Toddlers' Wear				Girls'/Subteens' Wear			
	Stores		Sales		Stores		Sales	
Store types reporting:	No.	%	Mil.$	%	No.	%	Mil.$	%
TOTAL*	35,087	100.0%	$2,537.6	100.0%	30,678	100.0%	$1,939.8	100.0%
Department stores	8,732	24.9	1,629.8	64.2	8,191	26.7	1,239.2	63.9
Women's ready-to-wear stores**	5,475	15.6	190.0	7.5	6,167	20.0	224.2	11.6
Family clothing stores	8,925	25.4	256.1	10.1	8,952	29.2	251.7	13.0
Men's wear stores	--	--	--	--	477	1.5	5.4	0.3
Shoe stores	4,108	11.7	41.6	1.6	55	0.2	0.1	#
Children's wear stores	4,225	12.0	346.4	13.7	3,239	10.6	168.8	8.7
Non-store retailers:								
Mail order houses (catalog sales)	3,622	10.3	73.7	2.9	3,597	11.7	50.4	2.6

	Boys'/Young Men's Wear***			
	Stores		Sales	
	No.	%	Mil.$	%
TOTAL****	33,554	100.0%	$3,898.1	100.0%
Department stores	8,575	25.6	2,737.9	70.2
Men's, boys' wear stores	5,880	17.5	378.7	9.7
Women's ready-to-wear stores	2,654	7.9	104.5	2.7
Family clothing stores	9,886	29.5	436.8	11.2
Children's wear stores	2,966	8.8	148.4	3.8
Non-store retailers:				
Mail order houses	3,593	10.7	91.8	2.4

*Total represents sales reported for the store types listed above. Not all types of stores selling women's and children's wear broke out merchandise line sales data in reports to the Census Bureau. However, the above reflects the total sales in the major types of outlets handling each category.

**Detailed data on merchandise line sales of Women's Accessory & Specialty Stores (including Furriers) were not included in the Census reports. There were a total of 4,962 stores in this classification with total women's and children's wear sales of $858.8 million in 1977.

***Includes boys' sizes 2 to 16; young men's sizes 13 to 20 and students' 32 to 44, clothing, furnishings and accessories.

****Total is based only on stores which reported sales of the specific merchandise category. Not all types of stores broke out sales in this detail. However, the above reflects sales in the major outlet types.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

By Store Type

Children's Wear Sales by Type of Merchandise In Department Stores, Women's Ready-to-Wear Stores & Family Clothing Stores, 1977

(Includes only stores with payroll)

	Department Stores	Women's Ready-To-Wear Stores	Family Clothing Stores
Total store sales (millions of $)	$76,909.4	$12,250.3	$7,883.6
Women's & children's wear, except footwear	16,250.7	11,066.5	3,471.6
Sales by type of merchandise:			
Total	100.0%	100.0%	100.0%
Children's wear	17.7	3.7	14.7
Infants' & toddlers' wear	10.0	1.7	7.4
Girls' & subteens' wear	7.6	2.0	7.3

Source: Fairchild Market Research Department based on U.S. Bureau of the Census, Census of Retail Trade, 1977.

Boys' Wear Sales by Type of Merchandise In Department Stores, Men's Wear Stores & Family Clothing Stores, 1977

(Includes only stores with payroll)

	Department Stores	Men's & Boys' Wear Stores	Family Clothing Stores
Total store sales (millions of $)	$76,909.4	$6,838.8	$7,883.6
Men's & boys' wear, exc. footwear	10,574.9	6,275.4	3,001.5
Sales by type of merchandise:			
Total	100.0%	100.0%	100.0%
Boys'/young men's wear	25.9	6.0	14.6

Source: Fairchild Market Research Department based on Census of Retail Trade, 1977, U.S. Bureau of the Census.

RETAIL SALES

By Store Type

Department Stores

Over 64% of all children's wear sales were consumated in department stores in 1977, up from the 60% figure recorded in 1972. These sales represented 17.7% of the women's and children's wear departments' sales. A majority of boys'/young men's wear sales, 70.2%, are transacted by department stores. This group accounts for nearly 26% of sales volume of their men's and boys' wear, according to the U.S. Bureau of the Census.

Annual operating results compiled by the National Retail Merchants Association show that among department stores with annual sales volume of over $1 million in 1979, the typical store showed gains in almost all categories of boys' and girls' wear over 1978. The one exception was girls' size 6 to 16 or 8 to 14 which registered a 4.7% decline.

According to the National Retail Association, sales of girls' wear sizes 3 to 6X and 7 to 14 showed typical (median) gains of 4.0% and 7.9%, respectively, in 1979 while apparel accessories and intimate apparel grew by 9.8% and 4.7% during the same period. Sales of boys' wear and furnishings grew from between 3.0% and 10.1% in 1979 compared to the prior year.

Merchandising & Operating Results in Girls' & Boys' Wear Departments in Department Stores With Total Annual Sales Over $1 Million, 1979
(Typical Results)

	Girls' Clothing, Sizes 3-6X and 7-14				
	3 to 6X	7 to 14	6 to 16 or 8 to 14	Apparel Accessories	Intimate Apparel
Net sales, % change from last year	+ 4.0%	+ 7.9%	- 4.7%	+ 9.8%	+ 4.7%
Sales, % of merchandise division	7.3	14.6	5.8	7.6	4.7
Sales, % of total store sales	0.4	0.8	0.3	0.5	0.3
$ sales per square foot of selling space	$ 58.0	$ 74.9	$ 57.0	$ 88.3	$ 57.3
Cumulative markon, %	49.8%	50.3%	51.2%	49.4%	49.2%
Gross margin, % of sales incl. cash discounts	45.4	47.1	43.6	45.8	45.2
Markdowns, retail, % of sales	15.6	13.4	20.2	8.7	9.2
Returns, % of sales	6.6	7.6	10.9	2.8	3.5
Number of stock turns	3.9	4.4	3.4	3.0	2.7
Salespeople's salaries, % of sales	7.8	7.9	7.4	7.8	7.8
Sales promotions, % of sales	3.3	3.0	3.1	2.4	2.6

(continued)

By Store Type

Department Stores

Merchandising & Operating Results in Girls' & Boys' Wear Departments In Department Stores With Total Annual Sales Over $1 Million, 1979

(Typical Results)
(continued)

	Boys' Clothing, Sizes 2-44			
	2 to 6X or 8	4 to 12 or 4 to 16	13 to 20 & 32 to 44	Boys' Furnishings (All Ages)
Net sales, % change from last year	+ 10.1%	+ 5.9%	+ 3.0%	+ 9.4%
Sales, % of merchandise division	6.8	14.4	20.9	13.1
Sales, % of total store sales	0.4	0.8	1.3	0.6
$ sales per square foot of selling space	$ 66.9	$ 73.7	$ 96.0	$ 75.0
Cumulative markon, %	48.2%	48.2%	48.6%	48.5%
Gross margin, % of sales incl. cash discounts	43.5	40.2	38.0	44.7
Markdowns, retail, % of sales	12.5	13.8	15.4	10.2
Returns, % of sales	5.9	8.2	9.5	5.9
Number of stock turns	3.5	2.6	2.5	3.1
Salespeople's salaries, % of sales	7.7	7.6	6.6	7.7
Sales promotions, % of sales	3.4	3.9	2.6	3.2

Source: National Retail Merchants Association, Merchandising and Operating Results of 1979, (1980 Edition).

Seasonal Pattern

Percent of Years' Total Sales by Month In Infants' & Children's Wear Departments

(Five Year Average)

Month	Infants' Wear	Girls' Wear	Boys' Wear
January	5.3%	3.7%	4.1%
February	5.5	4.6	4.7
March	8.6	9.1	8.0
April	7.9	7.6	7.9
May	6.2	6.1	6.3
June	5.9	5.8	6.4
July	5.9	5.8	5.4
August	8.4	11.7	10.5
September	9.2	9.0	9.0
October	9.3	8.9	8.2
November	11.3	11.1	10.8
December	16.5	16.6	18.7

Source: Newspaper Advertising Bureau,
Covering 1961-1965 indexes.

RETAIL ADVERTISING

Monthly Distribution of Retailers' Newspaper Advertising Linage

	Boys' Furnishings	Boys' Outer Apparel	Girls' Sportswear	Toddlers & Tots
Month				
January	4.2	4.4	2.5	4.5
February	4.2	6.2	4.5	4.9
March	5.7	10.3	6.5	7.1
April	8.2	14.3	6.7	11.6
May	7.8	5.4	8.1	5.6
June	6.3	4.6	6.6	6.9
July	7.5	6.0	7.3	6.9
August	21.0	19.6	21.6	12.2
September	7.0	5.8	7.2	10.8
October	7.8	7.6	7.1	9.2
November	10.5	8.4	12.5	10.4
December	9.8	7.4	9.4	9.9
Total linage	100.0%	100.0%	100.0%	100.0%

Source: The Advertising Checking Bureau, Inc., based on the Advertising Checking Bureau, Inc.,—Neustadt Reports, covering retail newspaper advertising linage in all news papers in seven cities: Chicago, Dallas, Philadelphia, Cincinnati, Cleveland, Los Angeles, and Washington. (1981 Newspaper Planbook).

PRICES

Producer

Producer prices for all items rose at a 14% rate in 1980, according to preliminary data released by the U.S. Bureau of Labor Statistics. Children's and infants' wear costs also rose but no classification increased as much as the national average.

The largest jump in costs came in the infants' and children's underpants group, which rose 13.3% over the first six months of 1980. Increases, for the total year, of 8.9%, 7.1%, and 4.6% were registered in infants' and children's knee socks, children's sport shirts and children's dresses, respectively.

Producer Price Index

	1980 Average (p)	1979 Average	% Change 1980/1979
All Items	268.6	235.6	+14.0%
Children's sport shirts	119.5	111.6	+ 7.1
Children's dresses	108.3	103.5	+ 4.6
Infants' & children's underpants	124.3*	109.7	+13.3
Infants' & children's knee socks	119.3	109.5	+ 8.9

(p) = preliminary
*January to June average

Source: U.S. Department of Labor, Bureau of Labor Statistics.

PRICES

Consumer

Girls' wear, as a category, rose 3.6% in the 1980 period from 1979's index of 99.8. This is only a minimal rise, however, compared to an inflation rate of 13.5% for the entire economy. Leading the charge towards higher girls' wear prices was underwear, nightwear, hosiery and accessories which registered a 5.3% increase. More modest rises of 4.9% and 1.1% were marked by separates and sportswear, and coats, jackets, dresses and suits, respectively.

Prices of boys' wear rose faster than girls' wear, at a 5.3% rate, but still quite reasonable compared to the entire economy. The largest jump came from suits, trousers, sportscoats and jackets which climbed at a 6.6% rate for the year. Lagging behind were furnishings and coats, jackets, sweaters and shirts, which rose at 6.2% and 5.4% rates, respectively.

The largest rise of all was registered by infants' and toddlers' wear, which, with an 8.4% inflation rate, was still well below the national average.

Consumer Price Index
(December 1977=100)

	1980 Average	1979 Average	% Change 1980/1979
All Items	246.8	217.4	+13.5%
GIRLS'	103.4	99.8	+ 3.6
Coats, jackets, dresses, and suits	100.1	99.0	+ 1.1
Separates and sportswear	102.4	97.6	+ 4.9
Underwear, nightwear, hosiery and accessories	110.7	105.1	+ 5.3
BOYS'	109.8	103.5	+ 6.1
Coats, jackets, sweaters, and shirts	105.1	99.7	+ 5.4
Furnishings	114.8	108.1	+ 6.2
Suits, trousers, sportcoats, and jackets	111.5	104.6	+ 6.6
INFANTS' AND TODDLERS' (1967=100)	239.0	220.9	+ 8.2

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

PRICES

Consumer

Median Regional Retail Price Points for Infants' Wear

Region	1980	1976	% Change 1980/1976
Northeast	$3.38	$2.47	+36.8
South	3.13	2.19	+42.9
North Central	3.11	2.22	+40.1
Mountain Southwest	3.05	2.27	+34.4
Pacific	3.41	2.48	+37.5

Source: Chain Store Age, Based on data from Market Research Corporation of America and CSA Research, April 1981.

BUYING HABITS

Children's wear presents a unique situation in consumer apparel purchases. For younger children, parents —usually mothers—play the key role in selection and purchase. Clothing selected must meet her criteria for appropriateness and also must be consistent with her perception of what the child desires. As children grow older, however, this second element—what the child desires—plays an increasingly important role, and children seem to be taking on this role at an increasingly early age.

A serious "conflict of interest" often develops between what the child desires and what the mother considers appropriate—especially between mothers and young girls. It is this basic purchase dynamics situation which literally controls the character of the children's wear market. Criteria of appropriateness (from either the mother's or the children's point of view) determines to a large extent the place of purchase, the amount spent, and the selection.

BUYING HABITS

The following information on children's and boys' wear has been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research Inc. They are based on the findings from an on-going monthly panel diary, tracking the purchases of 6,500 nationally representative families. (Note that "girls" includes girls 13 years old and younger while "boys" includes those 16 years and younger.)

Boys' Wear

Distribution of Boys' Wear Purchases by Type of Retail Outlet, 1980

	All Shirts	Jeans & Pants	Underwear	Suits/ Jackets	Outercoats & Jackets
Total Purchases	100.0%	100.0%	100.0%	100.0%	100.0%
National chains	25.5	27.1	28.8	28.5	32.4
Department stores	21.8	23.6	12.7	19.8	17.4
Discount stores	31.0	25.7	39.5	27.4	30.0
Specialty stores	11.7	15.3	4.5	16.6	11.2
All others	10.1	8.3	14.4	7.7	9.0

Percent of Purchases of Boys' Shirts by Price Point, 1980

	Dress Shirts		Sport Shirts	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $5.00	43.7	22.0	45.9	24.3
$5.00 - $8.99	35.7	37.5	35.9	39.4
$9.00 - $12.99	13.3	21.5	12.2	20.9
$13.00 & over	7.41	19.0	6.0	15.4

In 1980 the average price paid for a dress shirt by the members of the NPD Panel was $6.43.

Underwear

Percent of Purchases of Boys' Underwear by Price Point, 1980

	Undershirts		Undershorts	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $1.00	36.4	20.5	38.4	24.9
$1.00 - $1.49	32.6	29.1	40.7	40.4
$1.50 - $2.24	19.9	26.4	15.5	22.5
$2.25 & over	11.2	24.0	5.5	12.5

Source for the three preceding tables: NPD Research.

BUYING HABITS

Boys' Wear

Distribution of Purchases of Boys' Suits & Sports Coats by Price Point, 1980

	Suits		Sports Coats	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $22.00	27.3	10.9	45.6	19.8
$22.00 - $29.99	22.7	26.2	11.1	9.3
$30.00 - $55.99	29.3	30.8	30.5	39.2
$56.00 & over	20.7	43.0	12.8	31.7

Source: NPD Research.

Distribution of Purchases of Boys' Outerwear by Price Points, 1980

	Jackets		All Weather Coats		Other Coats	
	Units	Dollars	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $10.00	29.3	10.9	12.8	4.7	7.6	2.2
$10.00 - $19.99	38.8	30.9	36.6	24.8	44.2	29.8
$20.00 - $29.99	18.6	25.3	27.3	28.3	29.2	31.1
$30.00 & over	13.3	33.0	23.3	42.3	19.0	36.9

Source: NPD Research.

Infants' Wear

Distribution of Purchases of Infants' Wear by Type of Retail Outlet, 1980

	All Items
Total purchases	100.0%
National chains	20.4
Department stores	15.2
Discount stores	41.6
Specialty stores	10.3
All others	12.5

Source: NPD Research.

BUYING HABITS

Girls' Wear

Distribution of Girls' Wear Purchases by Type of Retail Outlet, 1980

	Blouses & Tops	Dresses & Skirts	Jeans & Pants	Outerwear	Nightwear
Total Purchases	100.0%	100.0%	100.0%	100.0%	100.0%
National chains	24.1	26.2	28.4	31.2	28.5
Department stores	18.2	21.3	19.9	16.7	17.8
Discount stores	33.1	29.4	24.6	30.5	34.0
Specialty stores	13.7	16.5	16.6	13.3	10.5
All others	10.9	6.7	10.5	8.3	9.2

Source: NPD Research.

Percent of Purchases of Girls' Shirts/Blouses by Price Point, 1980

	Shirts/ Blouses		All Other Tops	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $3.00	18.3	6.2	46.0	23.3
$3.00 - $4.99	25.7	17.2	31.5	33.4
$5.00 - $8.99	40.5	45.5	19.2	33.3
$9.00 & over	15.5	31.1	3.3	10.0

Source: NPD Research.

Distribution of Purchases of Girls' Slacks & Skirts by Price Points, 1980

	Slacks		Skirts	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $4.00	30.3	11.5	18.5	6.4
$4.00 - $7.99	38.1	32.1	38.5	27.5
$8.00 - $11.99	17.5	25.0	21.5	25.1
$12.00 & over	14.1	31.4	21.5	41.0

Source: NPD Research.

BUYING HABITS

Girls' Wear

Distribution of Purchases of Girls' Dresses & Suits by Price Point, 1980

	Dresses		Suits	
	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%
Less than $8.00	36.5	17.0	29.1	12.0
$8.00 - $11.99	28.1	24.7	28.0	12.0
$12.00 - $17.99	22.3	28.4	27.5	29.8
$18.00 & over	13.1	30.0	15.5	34.9

Source: NPD Research.

Distribution of Purchases of Girls' Outerwear by Price Point, 1980

	Jackets		All Weather Coats		All Other Coats	
	Units	Dollars	Units	Dollars	Units	Dollars
Total Purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $15.00	57.6	31.9	29.8	9.8	17.2	5.0
$15.00 - $24.99	24.8	30.2	23.0	17.2	26.5	17.7
$25.00 - $34.99	10.8	19.5	23.0	26.1	23.5	22.5
$25.00 & over	6.9	18.3	24.2	46.2	32.9	55.0

Source: NPD Research.

To measure the widespread apparel purchasing taking place during August and September by or for teenage girls preparing to go back to school, Seventeen Magazine conducted a mail survey in September 1980 among members of several of their Consumer Panels.

Returns were tabulated from 2,533 teenagers currently attending high school or college, and weighted to conform to Census Bureau population counts. Seventeen Magazine reports that findings are representative of 9,176,000 teenage-female students who spent $6,781,759,000 in preparation for going back to school in the fall of 1980.

(continued)

BUYING HABITS

Girls' Wear

Distribution of Reported Expenditures by Category

	(Thousands)	% of Total
Total	$6,781,759.0	100.0%
Outerwear (coats, jackets, suits, dresses, skirts, shirts/blouses, tops, sweaters, pants)	3,792,002.0	55.9
Footwear	825,125.0	12.2
Innerwear (hosiery, foundations, bras, lingerie, sleepwear/loungewear)	588,277.0	8.7
Accessories	585,182.0	8.6
Miscellaneous	991,173.0	14.6

Type of Store Where Wearing Apparel Is Usually Purchased
(Number of Teenage Girls in Thousands)

	Dresses	Suits/Coats	Sportswear	Sleepwear
Department stores	5,462	5,606	5,381	6,489
Boutique/specialty store	3,612	2,884	3,228	1,285
Discount store	585	575	1,018	1,083
Variety store	543	460	706	619
Mail order	235	146	337	381
Other	270	278	313	301
No answer	134	255	122	223
	*	*	*	*

*Adds to more than total because of multiple mentions.

Departments Girls Usually Shop in for Sportswear
(Percent of Total Girls)

Total	100.0%
Junior department	50.0
Misses department	6.4
Both junior and misses	37.8
Other	5.2
No answer	0.5
Shop in Junior Department (thousands of girls)	8,462
Shop in Misses Department (thousands of girls)	4,263

(continued)

BUYING HABITS

Girls' Wear

Size of Dress Last Purchased

Size	Percent of Purchases
Junior size	72 4%
Misses size	18.8
No answer	8.8
Total	100.0
Distribution by size:	
Junior size	
3	5.7
5	22.6
7	29.1
9	25.3
11	12.4
13	4.2
15 or larger	0.6

Size	
Misses size	
4 - 8	33.2
10	25.3
12	22.2
14	11.7
16	3.8
18 or larger	2.7

Importance of Various Factors in Purchasing Wearing Apparel
(Percent of Total Girls Responding)

	Important	Neutral	Unimportant	No Answer
Style	87.8%	10.0%	1.1%	1.0%
Comfort	86.4	10.7	1.6	1.3
Size	86.2	8.9	4.0	0.9
Color	82.7	15.1	1.1	1.0
Fashionable	81.0	15.1	2.5	1.4
Price	66.6	25.9	6.5	1.0
Durable	59.6	33.1	5.4	2.0
Feminine	55.2	34.0	8.9	1.9
Fabric	52.1	36.4	9.1	2.4
Easy to care for	43.8	41.3	12.6	2.2
Label name	25.5	35.4	37.1	1.9

Source: Seventeen's Back-To-School Study, (September 1981).

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store type.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS) (May): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (August): Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS (June): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR, AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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(Men's, Women's and Children's)
1981

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MEN'S, WOMEN'S & CHILDREN'S FOOTWEAR

Market Trends

A key factor in the outlook for the U.S. footwear industry—particularly for makers of lower-priced, unbranded footwear which are the smaller manufacturers—is the decision of the Reagan administration (announced at the end of June 1981) not to renew the Orderly Marketing Agreements (OMA's). These agreements had established voluntary quotas controlling footwear imports from Taiwan and South Korea, and had been in effect for four years.

This action is generally expected to result in greater availability of low-priced shoes in the U.S. market, but it is uncertain just how great an upsurge there will be in imports from these two sources. South Korea, which is mainly concerned with the production of athletic footwear—a shoe type in which U.S. manufacturers are strongly competitive—has already imposed its own "voluntary" restraint system limiting shipments of athletic shoes to 45 million pairs in the next 12 months. There are indications that Taiwan, too, might impose restrictions on itself to prevent surges in shipments to the U.S. that might lead to restrictions in the future, as well as to keep prices from plummeting.

Prior to the elimination of the OMA's, shipments of nonrubber footwear in terms of pairage were expected to increase 2% in 1981, reversing a four-year decline, according to the U.S. Department of Commerce.

In 1980, nonrubber footwear shipments were valued at $4.5 billion, 6.2% more than 1979. Per capita consumption was 3.4 pairs, down from 3.7 pairs in 1979. However, per capita expenditures increased to an estimated $31.07 in 1980 compared with an estimated $30.04 in 1979.

Leather was still the predominant material used for nonrubber footwear uppers. Nearly 52% of U.S.-produced footwear of this type had uppers of leather. The 1980 factory price of leather used in footwear manufacturing declined 12.3% from record levels set in 1979.

Imports of nonrubber footwear declined to their lowest level since 1975. At 366 million pairs (as measured by the Department of Commerce), imports were 9.6% below the 1979 level. The import penetration level, which had risen above 50% for the first time in 1979, slipped to 49% in 1980. After being in force since mid-1977, the Orderly Marketing Agreements limiting nonrubber footwear imports from Taiwan and Korea were allowed to expire on June 30, 1981. During this time, imports from these two countries were reduced to 50% of total nonrubber footwear imports compared to 61% in 1977. Imports from uncontrolled countries increased an average of about 10% annually in this time.

The continued rise in U.S. exports of nonrubber footwear influenced the U.S. Government's decision to terminate the OMA's. Since 1977, exports have risen 220.0% in value and 141.0% in pairage to $112 million and 13.0 million pairs, respectively.

(continued)

MEN'S, WOMEN'S & CHILDREN'S FOOTWEAR

Market Trends

Apparent U.S. consumption of rubber and plastics footwear was 253.6 million pairs, of which about 75% was footwear with fabric uppers and rubber or plastics soles. Imports accounted for about 60% of this market. Little real growth is expected in the domestic rubber footwear industry in the near future.

The U.S. International Trade Commission reported first quarter 1981 domestic nonrubber footwear production at 95.8 million pairs, down 8% from the same 1980 period. Nonrubber footwear imports amounted to 106.7 million pairs, 3% higher than 1980's first quarter, while exports, at 3.2 million pairs, were 9% higher.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The 1978 annual survey of manufactures, compiled by the U.S. Census Bureau, covers the latest available industry information on footwear at the manufacturer level. The ASM is based on a sample of U.S. manufacturers and is conducted in interim years between the complete census of manufactures which is conducted every five years. The 1978 ASM data are adjusted for comparability with the latest census report (1977).

Data on the various segments of the footwear industry in the U.S., as classified in the Census Bureau reports, are summarized in the following tables.

According to the U.S. International Trade Commission, the number of firms with 10 or more employees producing nonrubber footwear declined to 307 in 1980 from 334 in 1977. The value of shipments, secondary products and miscellaneous receipts of all plants classified in the nonrubber footwear industry totaled $4.1 billion in 1978. The projected value for 1979 totals $4.4 billion, and for 1980, $4.8 billion, according to the U.S. Bureau of Industrial Economics. A forecast for 1981 by this source placed the value of industry shipments at $5.3 billion. (1981 U.S. Industrial Outlook)

Estimates by the American Footwear Industries Association (AFIA), placed the number of nonrubber footwear plants at 741 in 1980, representing an 8.6% decline compared with 1977. Much of the decrease occurred among plants producing fewer than 200,000 pairs of shoes annually.

GENERAL STATISTICS ON THE INDUSTRY

The U.S. Manufacturing Industry By Type of Footwear, 1972, 1977

	1978	1977	1972	% Change 1978/1977
NONRUBBER FOOTWEAR, TOTAL (SIC 314)				
Number of companies	na	541	645	--
Number of establishments#	na	811	917	--
With 20 or more employees	na	603	712	--
All employees (thous.)	143.8	145.5	176.1	- 1.2%
Production workers (thous.)	128.6	129.3	157.1	- 0.5
Payroll (mil. $)	$1,101.2	$1,031.5	$ 972.7	+ 6.8
Value added by manufacture (mil. $)**	2,183.7	2,069.4	1,796.2	+ 5.5
Value of shipments (mil. $)***	4,141.3	3,891.7	3,272.2	+ 6.4
Capital expenditures, new (mil. $)	40.7	37.1	37.1	+ 9.7
MEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3143*)				
Number of companies	na	115	115	--
Number of establishments#	na	213	221	--
With 20 or more employees	na	180	197	--
All employees (thous.)	54.2	55.0	61.5	- 1.5%
Production workers (thous.)	48.8	49.2	54.4	- 0.8
Payroll (mil. $)	$ 444.3	$ 417.0	$ 358.1	+ 6.5
Value added by manufacture (mil. $)**	896.5	871.9	674.4	+ 2.8
Value of shipments (mil. $)***	1,827.3	1,734.5	1,288.9	+ 5.3
Capital expenditures, new (mil. $)	18.0	14.5	14.3	+ 25.9
WOMEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3144*)				
Number of companies	na	243	296	--
Number of establishments#	na	328	422	--
With 20 or more employees	na	241	316	--
All employees (thous.)	56.2	57.6	77.4	- 2.4%
Production workers (thous.)	50.5	51.3	70.0	- 1.6
Payroll (mil. $)	$ 408.7	$ 388.6	$ 408.4	+ 5.2
Value added by manufacture (mil. $)**	798.4	755.0	763.6	+ 5.7
Value of shipments (mil. $)***	1,428.4	1,361.2	1,346.1	+ 4.9
Capital expenditures, new (mil. $)	12.4	9.7	14.8	+ 27.8
HOUSE SLIPPERS (SIC 3142*)				
Number of companies	na	65	82	--
Number of establishments#	na	78	91	--
With 20 or more employees	na	55	66	--
All employees (thous.)	8.1	8.1	8.5	--
Production workers (thous.)	6.9	7.0	7.1	- 1.4%
Payroll (mil. $)	$ 58.9	$ 54.5	$ 48.1	+ 8.1
Value added by manufacture (mil. $)**	136.0	108.8	85.7	+ 25.0
Value of shipments (mil. $)***	232.0	201.2	151.4	+ 15.3
Capital expenditures, new (mil. $)	2.5	2.3	1.6	+ 8.7

(continued)

GENERAL STATISTICS ON THE INDUSTRY

The U.S. Manufacturing Industry By Type of Footwear, 1972, 1977
(continued)

	1978	1977	1972	% Change 1978/1977
FOOTWEAR, EXCEPT RUBBER, NOT ELSEWHERE CLASSIFIED (SIC 3149*)				
Number of companies	na	159	152	--
Number of establishments#	na	192	183	--
With 20 or more employees	na	127	133	--
All employees (thous.)	25.2	24.8	28.7	+ 1.6%
Production workers (thous.)	22.3	21.8	25.6	+ 2.3
Payroll (mil. $).	$ 189.4	$ 171.4	$ 158.1	+ 10.5
Value added by manufacture (mil. $)**	352.8	333.7	272.5	+ 5.7
Value of shipments (mil. $)***	653.6	594.8	485.8	+ 9.9
Capital expenditures, new (mil. $)	7.8	10.6	6.4	- 26.4
RUBBER & PLASTICS FOOTWEAR (SIC 302*)				
Number of companies	na	67	82	--
Number of establishments#	na	84	107	--
With 20 or more employees	na	50	74	--
All employees (thous.)	20.2	19.8	31.5	+ 2.0%
Production workers (thous.)	17.8	16.4	26.5	+ 8.5
Payroll (mil. $)	$ 164.0	$ 159.1	$ 182.6	+ 3.1
Value added by manufacture (mil. $)**	283.9	272.3	370.3	+ 4.3
Value of shipments (mil. $)***	530.0	517.0	600.0	+ 2.5
Capital expenditures, new (mil. $)	23.4	11.3	17.1	+107.1
BOOT & SHOE CUT STOCK & FINDINGS (SIC 3131*)				
Number of companies	na	174	225	--
Number of establishments#	na	190	248	--
With 20 or more employees	na	96	121	--
All employees (thous.)	9.4	8.5	8.7	+ 10.6%
Production workers (thous.)	8.3	7.4	7.6	+ 12.2
Payroll (mil. $)	$ 73.6	$ 65.3	$ 50.1	+ 12.7
Value added by manufacture (mil. $)**	117.2	109.4	86.2	+ 7.1
Value of shipments (mil. $)***	298.4	270.6	206.5	+ 10.3
Capital expenditures, new (mil. $)	3.9	3.0	2.9	+ 30.0

na = not available

Each business location is counted as a separate establishment.

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) System determined by the principal product manufactured, as shown below:

SIC 3143 comprises establishments primarily engaged in the production of men's dress and casual shoes, boots and work shoes. Footwear produced in this industry is primarily of leather.

SIC 3144 comprises establishments primarily engaged in the production of women's dress and casual shoes, sandals and boots. Footwear produced in this industry is primarily of leather.

SIC 3142 comprises establishments primarily engaged in the production of house slippers of leather or other materials. Slipper socks are included in this industry.

SIC 3149 comprises establishments primarily producing footwear not classified in the above industries or in SIC 3021 (rubber and plastic). Included in SIC 3149 are shoes for infants and babies, children, misses, youths and boys. Also included are all athletic shoes, theatrical shoes, and beach slippers.

(continued)

(Footnotes continued)

SIC 302 comprises establishments primarily engaged in manufacturing all-rubber and plastics footwear, waterproof fabric-upper footwear having rubber or plastic soles vulcanized to the uppers. Included in this category are sneakers, athletic footwear such as jogging shoes, protective footwear and zori.

SIC 3131 comprises establishments primarily engaged in manufacturing leather soles, inner soles, and other boot and shoe cut stock and findings. This industry also includes finished wood heels. It does not include manufacturers of shoe findings made of rubber, plastic, or fiber.

**Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, contract work, etc., from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

***Value of shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products, as well as miscellaneous receipts for contract work, resales, etc. This value should be clearly distinguished from the total value of footwear made by all producers, including those who make footwear as a secondary product and who are classified in other industries. This total product value is shown in the tables on pages 15-16.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1978.

Definition of other terms:

The term "nonrubber footwear," as used in this report, refers to footwear that is primarily leather, as covered in SIC 314. "Rubber/plastic" footwear refers to types covered in SIC 302.

Employment & Earnings

In the first four months of 1981, employment in the nonrubber footwear industry in the U.S. was slightly higher than in the same 1980 period. Production worker employment, which averaged 130,500 in the 1981 period was up 0.6%; total employment, which averaged 152,500, was up 0.7%.

Total employment in 1980 averaged 151,500, up 0.2% compared with 1979. However, the number of production workers was down 0.2%, averaging 129,700 in 1980. In the rubber/plastic footwear industry, total employment fell 2.1% in 1980 to 22.5 thousand compared to 23.0 thousand in 1979. Production worker employment was down about 1%.

Average hourly earnings in the nonrubber footwear industry rose 8.1% over 1979 to $4.42. Average weekly hours increased 0.8% to 36.5.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings in the U.S. Footwear Industry, 1978-1980

	Annual Average Employment (in Thousands)					
	Total Employees			Production Workers		
	1980	1979	1978	1980	1979	1978
Nonrubber footwear, total	151.5	151.2	158.4	129.7	129.9	138.1
Men's, except athletic	57.7	58.6	64.2	49.6	50.9	56.7
Women's, except athletic	60.1	60.6	61.9	51.1	51.7	53.5
Rubber/plastics footwear	22.5	23.0	24.0	19.9	20.1	21.0

	Production Workers					
	Avg. Weekly Hours			Avg. Hourly Earnings		
	1980	1979	1978	1980	1979	1978
Nonrubber footwear, total	36.5	36.2	36.9	$4.42	$4.09	$3.75
Men's, except athletic	37.2	37.2	37.8	4.66	4.28	3.89
Women's, except athletic	35.7	35.2	36.1	4.26	3.93	3.65
Rubber/plastics footwear	41.6	38.2	38.2	4.43	4.12	3.80

Source: U.S. Department of Labor,
Bureau of Labor Statistics,
Employment & Earnings
Supplement, September 1980, March 1981.

Industry Concentration

The U.S. footwear industry has become increasingly concentrated among larger firms able to withstand the competition of imports. In 1979, according to the Federal Trade Commission, out of a total of 307 firms with 10 or more employees, 51 firms (17%) accounted for 69% of total nonrubber footwear production.

Nonrubber Footwear Manufacturers by Size of Output, 1978, 1979

	1979		1978	
	No. of Firms*	% of Total Production	No. of Firms*	% of Total Production
Total	307	100%	301	100%
Producers manufacturing:				
Less than 200,000 pairs	84	2	86	2
200,000 to 499,999 pairs	81	6	70	5
500,000 to 999,999 pairs	50	9	61	11
1,000,000 to 1,999,999 pairs	41	14	35	11
2,000,000 to 3,999,999 pairs	29	20	26	17
4,000,000 pairs & over	22	49	23	54

*Does not include firms employing fewer than 10 workers.

Source: U.S. International Trade Commission,
Nonrubber Footwear Pub. No. 1139,
April 1981, based on U.S. Bureau of the
Census data.

GENERAL STATISTICS ON THE INDUSTRY

Industry Concentration

Footwear Manufacturing Establishments by Employment Size, 1977

	Men's Footwear Exc. Athletic (SIC 3143*)	Women's Footwear Exc. Athletic (SIC 3144*)	House Slippers (SIC 3142*)
Total establishments (plants)	213	328	78
Number by employment size:			
Under 20 employees	33	86	23
20-99 employees	29	69	31
100-249 employees	53	69	15
250-499 employees	76	90	8
500 or more employees	22	14	1

	Footwear, Except Rubber, n.e.c. (SIC 3149*)	Rubber and Plastics Footwear (SIC 3021*)
Total establishments (plants)	192	84
Number by employment size:		
Under 20 employees	65	34
20-99 employees	50	16
100-249 employees	38	10
250-499 employees	33	11
500 or more employees	6	13

*For a definition of these SIC codes, see page 4.
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading States in the Footwear Industry, 1977

	Establishments		Value of Shipments (Mil. $)	Value Added by Manufacture (Mil. $)
	No.	With 20+ Employees		
Men's footwear, exc. athletic (SIC 3143*)	213	180	$1,734.5	$871.9
New England Division:				
Maine	21	17	175.4	89.8
New Hampshire	11	10	64.8	32.4
Massachusetts	22	15	129.3	68.5
Middle Atlantic Division:				
Pennsylvania	18	17	127.4	57.8
East North Central Division:				
Wisconsin	20	19	191.6	107.9
West North Central Division:				
Missouri	12	12	(D)	(D)
East South Central Division:				
Tennessee	20	19	234.7	123.7
West South Central Division:				
Texas	15	9	65.9	34.0
Women's footwear, exc. athletic (SIC 3144*)	328	241	1,361.2	755.0
New England Division:				
Maine	30	26	180.1	101.2
New Hampshire	27	22	148.4	83.7
Massachusetts	37	25	129.8	62.8
Middle Atlantic Division:				
New York	39	23	70.3	40.6
Pennsylvania	28	25	104.6	57.6
West North Central Division:				
Missouri	24	22	172.7	92.3
West South Central Division:				
Arkansas	13	12	62.1	35.7
Pacific Division:				
California	37	24	93.2	53.1
House slippers (SIC 3143*)	78	55	201.2	108.6
Middle Atlantic Division:				
New York	21	14	53.1	28.6
Rubber & plastics footwear (SIC 3021*)	84	50	517.0	272.3
New England Division:				
Maine	3	3	18.0	7.7
New Hampshire	5	4	33.1	14.1
Middle Atlantic Division:				
Pennsylvania	8	7	35.1	19.4
Pacific Division:				
California	8	4	9.5	5.9

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading States in the Footwear Industry, 1977
(continued)

(D) = Withheld by the Census Bureau to avoid disclosing operations of individual companies.
* For a definition of these SIC codes, see page 4.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

LEADING MANUFACTURERS AND OPERATING RESULTS

The combined operating profits of 10 large publicly-owned footwear manufacturers increased 12.8% in fiscal 1980 compared to a year ago. Net sales were up 8.4% over the same period. Their combined net profit rose 14.4% from fiscal 1979. These firms were among those whose annual reports were analyzed in Footwear News (July 6, 1981).

Sales & Profits of Selected Footwear Manufacturers

	Total Sales* (Mil. $)		Operating Profit* (Mil. $)		Footwear's Contribution			
					% of Sales		% of Op. Profit	
	1980	1979	1980	1979	1980	1979	1980	1979
Interco, Inc.	$2,368	$2,024	$261	$216	24%	27%	32%	30%
Brown Group, Inc.#	1,221	1,145	92	89	69	70	80	75
U.S. Shoe Corp.	933	831	81	69	64	65	44	51
Genesco, Inc.	834	993	37	52	54	46	nr	nr
Wolverine World Wide	253	204	26	19	nr	nr	nr	nr
Stride Rite Corp.	166	136	16	11	100	100	100	100
R. G. Barry Corp.##	127	109	7	6	100	100	100	100
Craddock Terry	97	91	8	7	100	100	100	100
Suave Shoe Corp.	97	85	9	5	94	94	94	94
Weyenberg Mfg.	81	79	2	2	100	100	100	100

* Consolidated results
nr = not reported
#Fiscal 1979 contained 53 weeks.
##Fiscal 1980 contained 53 weeks.

Source: Fairchild Market Research Department,
based on annual reports.

LEADING MANUFACTURERS AND OPERATING RESULTS

Selected Key Business Ratios of Footwear Manufacturers, 1980
(Median Results)

	Men's Footwear, Except Athletic (SIC 3143*)	Women's Footwear, Except Athletic (SIC 3144*)
Number of reporting firms	58	36
Current assets to current debt (times)	2.39	2.23
Net profits on net sales (percent)	3.27	3.71
Net profits on net worth (percent)	13.26	17.53
Net sales to inventory (times)	4.8	6.6
Collection period (days)	44	52

*For a definition of these SIC numbers, see page 4.

Source: Dun & Bradstreet,
Key Business Ratios,
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U.S. producers of nonrubber footwear who responded to a survey taken by the U.S. International Trade Commission reported a 47.1% increase in pre-tax profit on their total footwear operations (manufacturing, purchasing and retailing) in 1980, although their reported net sales increased only 11.1%.

Pre-tax profits on their footwear manufacturing operations increased 68.1% on $2.3 billion in sales, a 12.0% rise over 1979. The ratio of pre-tax profit to net sales was 7.8% on manufacturing operations, and 8.2% overall. For both total operations and manufacturing operations, the ratio of operating profit to sales was similar—8.5% and 8.3%, respectively.

Net Sales & Profits of U.S. Producers of Nonrubber Footwear, 1979, 1980
(Millions of Dollars)

	Net Sales	Gross Profit	Net Operating Profit	Pre-Tax Profit	Net Operating Profit/ Net Sales
1980	$2,948.6	$789.9	$250.9	$241.6	8.5%
1979	2,654.8	648.1	170.5	160.8	6.4

NOTE: Sales and profits figures are for 68 U.S. producers of nonrubber footwear accounting for approximately 42% of total U.S. production.

Source: U.S. International Trade Commission,
Nonrubber Footwear Pub. No. 1139,
April 1981.

PRODUCTION

Nonrubber Footwear

U.S. production of nonrubber footwear in 1980 totaled 394.4 million pairs, 1.0% below the 1979 total of 398.5 million pairs, and marking the lowest level since 1938. Between 1979 and 1980, U.S. footwear production declined 29.9% with the sharpest declines reported in the 1970-1976 period. Since 1976 the rate of decline has slowed and this is generally attributed to the protection of import quotas in effect for the past four years as well as to a growth in U.S. exports.

Domestic output of women's nonrubber footwear amounted to 143.5 million pairs in 1980, according to preliminary figures. This is 1.7% below the 1979 total. This category is adversely affected by imports to a greater extent than any other major shoe category. In 1979, import penetration for the women's shoe market was estimated at 63.8%.

Output of men's shoes rose to 92 million pairs according to preliminary data for 1980, up slightly from the 1979 total. Imports of men's footwear represented 38.5% of the market in 1980, down from 39.9% the previous year. U.S. production of athletic shoes rose 20.2%, totaling 24.7 million pairs in 1980. Imports dominate this market, representing some 68.2% of the total domestic supply in 1980.

Summary of Production of Nonrubber Footwear by U.S. Producers, 1970, 1976-1980
(Millions of Pairs)

	1980(p)	1979(r)	1978	1977(r)	1976	1970
Nonrubber footwear	394.4	398.5	418.9	418.1	422.5	562.3
% change over previous year	- 1.0%	- 4.9%	+ 0.2%	- 1.0%	+ 2.3%	- 2.5%

(p) = preliminary
(r) = revised

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Footwear MA-21A.

Rubber/Plastics Footwear

This classification includes footwear which is protective (such as hunting boots, galoshes, overshoes and boots), zori (a sandal-type footwear) and footwear with fabric uppers and soles of rubber or plastics (shoes commonly known as sneakers, as well as athletic shoes designed for jogging and for specific sports such as racquetball and soccer; also espadrilles).

Preliminary data indicate that rubber/plastics footwear production in the U.S. declined in 1980 due primarily to a 7.9% cut-back in production of rubber-soled, fabric upper footwear, which, as noted, is primarily athletic shoes. Output dropped to an estimated 72 million pairs compared with 78.1 million pairs in 1979. Production of rubber and plastics protective footwear rose 8.6% to 25.6 million pairs in 1980.

Import penetration in the rubber/plastics footwear industry, according to the U.S. International Trade Commission, increased from 40% in 1975 to 68% in 1978, but declined to 60% in 1980.

U.S. Production of Footwear by Type, 1978-1980
(Thousands of Pairs)

	1980(p)	1979(r)	1978(r)
Footwear, nonrubber & rubber/plastics, total	491,886	500,141	522,578
Footwear, incl. slippers (nonrubber), total	394,370	398,480	418,948
Shoes, incl. athletic (nonrubber), total	326,257	325,701	335,547
Men's shoes (exc. athletic), total	91,999	91,695	102,498
Dress & casual shoes	71,074	69,808	63,498
Dress & casual boots			14,365
Work shoes, anklet height or higher	20,565	21,536	24,243
Type not specified	360	351	392
Youths' & boys' shoes (exc. athletic)	11,648	12,132	14,343
Women's shoes (exc. athletic), total	143,554	145,920	145,436
Sandals	na	16,163	16,750
Casual shoes (exc. sandals)	na	60,580	59,020
Dress shoes	na	54,390	52,366
Boots, anklet height or higher	na	13,680	16,197
Type not specified	na	1,107	1,103
Misses' shoes (exc. athletic)	11,659	13,748	13,090
Children's shoes (exc. athletic)	13,282	13,899	16,162
Infants' & babies' shoes	22,107	22,801	23,166
Athletic shoes, total	24,676	20,529	20,852
By type:			
Designed for sports	na	6,200	6,709
Other (joggers, etc.), total	na	14,329	13,859
Up to size 3	na	1,843	2,740
Size 3 & over	na	12,486	11,119
Slippers, total	68,473	72,779	79,353
Men's, youths' & boys'	na	15,254	14,574
Women's & misses', total	na	52,383	57,641
Children's, infants' & babies'	na	4,485	6,422
Type not specified	na	657	716
Other footwear exc. with sole vulcanized to fabric upper or rubber/plastics & protective footwear	4,161	3,651	2,669
Shoes, type not specified	979	1,326	1,379
Shoes with sole vulcanized to fabric upper, total	71,955	78,130	79,278
Men's	na	25,125	26,846
Youths' & boys'	na	22,387	18,329
Women's & misses'	na	20,281	20,749
Children's & infants'	na	10,337	13,354
Rubber & plastic protective footwear, total	25,561	23,531	24,352
Rubber protective footwear, total	13,280	11,087	10,951
Boots	na	1,717	1,433

(continued)

U.S. Production of Footwear by Type, 1978-1980
(Thousands of Pairs)
(continued)

	1980(p)	1979(r)	1978(r)
Rubber & plastic protective footwear, total (continued)			
Arctics & gaiters	na	3,383	3,284
Light & heavy rubbers	na	2,361	2,642
Other rubber footwear, incl. lumberman & pacs	na	3,626	3,592
Plastic protective footwear, total	12,281	12,444	13,401

(p) = preliminary
(r) = revised
na = not available

Source: U.S. Bureau of the Census, Current Industrial Reports, Series MA-31A.

By Geographic Region

Footwear manufacturers in New England produced 104.0 million pairs, or 26.1% of the total 398.5 million pairs of nonrubber footwear produced in the U.S. in 1979. The North Central region accounted for 21.6% and the Middle Atlantic region 20.7%.

Maine was the leading state in nonrubber footwear production in 1979. Plants in this state accounted for 12.1% of total production, or 48.1 million pairs. Missouri plants produced 42.8 million pairs, 10.7% of the total.

Production of Nonrubber Footwear by Geographic Region, 1979

	Production (Thous. Pairs)	% of Total
Total	398,480	100.0%
New England Region	104,005	26.1
Maine	48,056	12.1
Massachusetts	31,146	7.8
Middle Atlantic Region	82,682	20.7
New Jersey	11,983	3.0
New York	33,298	8.4
Pennsylvania	37,401	9.4
North Central Region	85,974	21.6
Ohio	16,371	4.1
Illinois	7,195	1.8
Wisconsin	8,844	2.2
Missouri	42,769	10.7

(continued)

Production of Nonrubber Footwear by Geographic Region, 1979
(continued)

	Production (Thous. Pairs)	% of Total
South & West Regions	122,378	30.7%
Virginia	4,730	1.2
North Carolina	7,944	2.0
Tennessee	29,811	7.5
California	7,584	1.9
Geographic area, n.s.k.	3,441	0.9

n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Current Industrial Report,
Footwear MA-31A.

Capacity Utilization

Despite the continued decline in the number of footwear producers, the industry has considerable unused productive capacity reported at 23.8% in 1980, by the U.S. International Trade Commission, versus 23.3% in 1978 and 28.7% in 1977.

These figures should be viewed against a general decline in apparent consumption and a slight increase in import market penetration, and the fact that most of the firms that have gone out of business have been smaller producers.

Percent Utilization of Capacity by Types of Nonrubber Footwear, 1975-1979

	1979	1978(r)	1977(r)	1976	1975
Total industry	76.6%	75.2%	76.0%	75.9%	69.1%
Men's shoes	73.5	78.2	80.3	83.5	74.1
Youths' & boys' shoes	73.6	63.5	53.6	82.2	55.7
Women's shoes	82.2	75.8	76.6	78.2	75.2
Misses' shoes	77.2	67.8	68.6	79.2	52.8
Children's shoes	60.5	60.2	68.2	78.1	72.4
Infants' & babies' shoes	78.4	71.6	70.1	76.9	78.3
Athletic shoes	81.2	82.5	79.9	83.0	70.0
Slippers	73.2	79.8	78.2	60.5	56.5
Other	71.0	57.8	80.9	42.0	66.9
Sub-total: shoes only	75.9	74.7	74.8	79.6	72.4
Effective capacity (million pairs)	520.3	556.8	550.5	556.5	598.2
Production (million pairs)	398.5	418.9	418.1	422.5	413.1

(r) = revised

Source: American Footwear Industries Association.

PRODUCTION

Materials & Construction

Some substitution of synthetic and cloth upper materials has occurred since 1977 because of high leather prices, particularly in 1979 and early 1980. Nevertheless, leather remains the predominant upper material. Nonrubber footwear produced with all- or part-leather uppers accounted for 51.0% of total production in the first half of 1980, down from 53.7% for calendar year 1979 and 55.6% for 1978. Leather could recover some lost ground if hide and skin prices are moderate and stable while prices for petroleum-derived synthetic materials increase.

In men's footwear (including dress and casual shoes and work boots), 82% by quantity is of leather, 13% vinyl or plastic, 5% other materials. About 52% of the content of women's shoes was leather in 1980, according to the Department of Commerce; 38% was vinyl or plastic; 10% other materials such as textiles and fibers.

Approximately 6% of slipper production is made of leather, 22% of vinyl or other plastic, and the balance other materials, primarily textiles.

The total value of all materials, supplies, etc., consumed in the nonrubber footwear industry was reported by the U.S. Census Bureau as follows, based on the 1977 Census of Manufactures.

Materials Consumed in the Nonrubber Footwear Industry, 1977
(Delivered Cost in Millions of Dollars)

	Men's Footwear, Exc. Athletic (SIC 3143*)	Women's Footwear, Exc. Athletic (SIC 3144*)	Footwear, Exc. Rubber, N.E.C. (SIC 3149*)	House Slippers (SIC 3142*)
Total materials consumed	$795.7	$553.5	$240.9	$ 83.3
Finished leather	431.5	183.2	84.6	4.8**
Cut stock & findings	137.2	108.5	42.4	2.1
Plastics	37.6	68.7	31.0	10.3
All other materials, containers & supplies	226.8	193.1	82.9	66.1

*For a definition of these SIC codes, see page 4.
**Delivered cost of soling leather is not included in this total.

Source. U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-I-31A.

SHIPMENTS

Nonrubber Footwear

Preliminary Bureau of the Census data places the value of nonrubber footwear shipments by all U.S. manufacturers at $4.5 billion in 1980, representing a rise of 6.2% compared with the 1979 total of $4.3 billion. An estimated 389.9 million pairs of nonrubber footwear were shipped in 1980, which was 3.2% below 1979 and which marked the fifth consecutive year that pairage shipments declined.

(continued)

Nonrubber Footwear (continued)

Detailed data on footwear shipments by type will be reported by the Census Bureau for 1980 later this year. Estimates for major categories of nonrubber footwear as well as trends in shipments anticipated for 1981, as reported by the U.S. Bureau of Industrial Economics (1981 U.S. Industrial Outlook) are noted below. This source projects a 7% compound annual rate of increase in footwear industry shipments between 1980 and 1985, to reach $6.8 billion. This growth in current dollars is expected to include an increase in quantity of shipments of about 1%, compounded annually. The extent to which the failure of the Reagan administration to renew the Orderly Marketing Agreements will affect future industry shipments remains to be seen.

Estimated 1980 Shipments of Nonrubber Footwear by U.S. Manufacturers
& Projected Rate of Growth, 1981/1980

	Estimated 1980		Projected Growth 1981/1980	
	Quantity (Mil. Prs.)	Value (Mil. $)	Quantity	Value
Nonrubber footwear, total	390	$4.5	+ 2.1%	+ 8.7%
Men's (except athletic)	86	1.9	+ 2.3	+ 9.5
Women's (except athletic)	144	1.8	+ 2.1	+ 8.3
Houseslippers	70	.27	+ 1.4	+ 7.5
Other, including athletic	90	.65	+ 2.2	+ 7.9

Source: U.S. Bureau of Industrial Economics,
1981 U.S. Industrial Outlook.

Detailed information on footwear shipments in 1979 has been compiled by the U.S. Bureau of the Census, based on a sample survey of manufacturers. The total value of U.S. shipments of all types of footwear was $4.7 billion, up 12.8% compared with the 1978 value of $4.2 billion. Pairage slipped 1.4% in 1979, with 510.4 million pairs shipped compared to 517.7 million in 1978.

Nonrubber footwear shipments rose 12.3% in value to $4.3 billion despite a 2.5% drop in the number of pairs shipped. Three nonrubber footwear categories did manage to increase shipments pairage in 1979. Women's shoes, which accounted for 36.3% of the total quantity and 38.5% of the total value of shipments in 1979, increased 1.2% in pairage to 146.2 million and 12.8% in value to $1.6 billion. Misses' shoes gained 8.5% in pairage and 11.1% in value. Athletic footwear rose 18.1% in value to $185 million and 1.0% in pairage to 21.1 million. Although the number of pairs of men's shoes shipped by U.S. manufacturers fell 5.4% in 1979 to 92.1 million, their value was 11.5% higher than in 1978.

Rubber/Plastics Footwear

U.S. producers' shipments of rubber/plastics footwear decreased in each year during 1975-1978, from 149.7 million pairs, valued at $459.6 million in 1975 to 104.8 million pairs, valued at $407 million in 1978, then increased slightly in 1979 to 107.8 million pairs, valued at $480.2 million. Footwear with fabric uppers and soles of rubber or plastics represented about 77% of the total. Shipments of this type declined from 132.9 million pairs in 1975 to 83.2 million pairs in 1979.

Producers' shipments of protective footwear increased annually since 1975, from 16.8 million pairs, valued at $90.7 million to 24.6 million pairs, valued at $161.2 million in 1979. About half of domestic shipments consists of boots, arctics and gaiters.

Quantity & Value of Footwear Shipments by U.S. Manufacturers, 1977-1979

(Quantity in millions of pairs; value in millions of dollars)

	Quantity			Value			Avg. Value Per Pair
	1979(r)	1978(r)	% Change 1979/1978	1979(r)	1978(r)	% Change 1979/1978	1979
Total shipments, all types of footwear	510.4	517.7	- 1.4%	$4,746.2	$4,206.3	+12.8%	$ 9.30
Nonrubber shoes & slippers	402.6	412.9	- 2.5	4,266.0	3,799.3	+12.3	10.60
Men's shoes (exc. athletic)	92.1	97.4	- 5.4	1,773.5	1,590.0	+11.5	19.26
Dress & casual shoes	59.5	59.6	- 0.2	1,007.5	870.1	+15.8	16.93
Boots, dress & casual	12.2	13.7	-11.0	344.0	289.4	+18.9	28.07
Work shoes, ankle ht. or higher	20.0	23.8	-16.0	416.4	425.1	- 2.1	20.80
Shoes, type not specified	0.3	0.4	-25.0	5.6	5.4	+ 3.7	18.67
Youths' & boys' (exc. athletic)	12.3	15.2	-19.1	98.8	103.0	- 4.1	8.00
Women's shoes (exc. athletic)	146.2	144.5	+ 1.2	1,646.9	1,459.4	+12.8	11.26
Sandals	16.0	16.4	- 2.4	174.4	134.4	+29.8	10.90
Casual, exc. sandals	59.3	59.6	- 0.5	579.8	527.8	+ 9.8	9.78
Dress	54.5	51.5	+ 5.8	604.2	543.6	+11.1	11.09
Boots, ankle ht. or higher	15.2	15.9	- 4.4	276.1	242.8	+13.7	18.16
Shoes, type not specified	1.1	1.1	--	12.4	10.8	+14.8	11.27
Misses' shoes (exc. athletic)	14.0	12.9	+ 8.5	86.9	78.2	+11.1	6.21
Children's shoes (exc. athletic)	14.2	15.8	-10.1	98.2	98.3	- 0.1	6.92
Infants'/babies' shoes	24.0	23.0	+ 4.3	97.5	93.1	+ 4.7	4.07
Athletic shoes, total	21.1	20.9	+ 1.0	185.0	156.7	+18.1	8.78
Slippers, total	73.6	79.0	- 6.8	245.0	194.8	+25.8	3.33
Men's, youths', boys'	13.6	14.4	- 5.6	45.5	39.9	+14.0	3.35
Women's, misses'	54.0	57.4	- 5.9	184.0	144.1	+27.7	3.41
Children's, infants', babies'	5.3	6.4	-17.2	13.2	8.9	+48.3	2.49
Type not specified	0.7	0.7	--	2.2	1.8	+22.2	3.14
All other shoes & slippers	3.8	2.8	+35.7	25.6	17.7	+44.6	6.74
Shoes, exc. men's & women's, type not specified	1.3	1.3	--	8.5	8.1	+ 4.9	6.54

(continued)

Quantity & Value of Footwear Shipments by U.S. Manufacturers, 1977-1979

(Quantity in millions of pairs; value in millions of dollars)

	Quantity			Value			Avg. Value Per Pair
	1979(r)	1978(r)	% Change 1979/1978	1979(r)	1978(r)	% Change 1979/1978	1979
Shoes with sole vulcanized to fabric upper, total*	83.2	81.6	+ 2.0%	$319.0	$286.6	+11.3%	$ 3.83
Men's	28.4	27.2	+ 4.4	133.6	114.3	+16.9	4.70
Youths', boys'	20.1	18.8	+ 6.9	71.1	62.9	+13.0	3.54
Women's, misses'	22.7	22.2	+ 2.2	86.6	81.0	+ 6.9	3.81
Children's, infants', babies'	12.0	13.4	-10.5	27.7	28.4	- 2.5	2.31
Rubber & plastic protective footwear	24.6	23.2	+ 6.0	161.2	120.4	+33.9	6.55
Rubber protective footwear, total**	10.1	10.3	- 1.9	81.6	65.9	+23.8	8.08
Boots	1.8	1.5	+20.0	23.3	17.9	+30.2	12.94
Arctics & gaiters	3.1	3.3	+ 6.1	22.2	16.7	+32.9	7.16
Light/heavy rubbers	2.3	2.5	- 8.0	10.5	9.0	+16.7	4.56
Plastic protective footwear, total	14.5	12.8	+13.3	79.5	54.4	+46.1	5.48

*Data may contain some imported shoes.
**Includes types not separately listed.
(r) = revised
nr = not reported

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Footwear, MA-31A.

SHIPMENTS

Value of Shipments by All Producers of Specified Types of Footwear By Leading States, 1972, 1977

	Value of Shipments (Mil. $)		
	1977	1972	% Change 1977/1972
Men's dress & casual shoes, exc. athletic, total	$872.5	$714.0*	+ 22.2%
New England Division:			
Maine	100.5		
New Hampshire	42.5		
Massachusetts	62.6		
Middle Atlantic Division:			
Pennsylvania	104.6		
East North Central Division:			
Wisconsin	100.0		
West South Central Division:			
Arkansas	36.6		
Men's dress & casual boots, except work, total	271.0	154.1	+ 75.9
New England Division:			
Maine	12.0	nr	
Massachusetts	28.9	12.6	+129.4
Middle Atlantic Division:			
Pennsylvania	15.7	nr	
East South Central Division:			
Tennessee	90.1	nr	
West South Central Division:			
Texas	56.1	nr	
Men's work shoes & boots, total	421.7	309.5	+ 36.2
New England Division:			
Maine	41.3	25.0	+ 65.2
New Hampshire	16.8	nr	
Massachusetts	33.0	24.7	+ 33.6
East North Central Division:			
Wisconsin	52.0	32.0	+ 62.5
South Atlantic Division:			
North Carolina	30.2	nr	
Women's dress shoes, total	480.6	**	
New England Division:			
Maine	41.7		
New Hampshire	52.9		
Massachusetts	44.7		
Middle Atlantic Division:			
New York	25.1		
Pennsylvania	17.9		
West North Central Division:			
Missouri	63.5		
Pacific Division:			
California	28.9		

(continued)

Value of Shipments by All Producers of Specified Types of Footwear By Leading States, 1972, 1977

(continued)

	Value of Shipments (Mil. $)		
	1977	1972	% Change 1977/1972
Women's casual shoes, exc. sandals, total	$524.6	**	
New England Division:			
Maine	105.2		
New Hampshire	28.8		
Massachusetts	44.0		
Middle Atlantic Division:			
New York	12.3		
Pennsylvania	48.6		
West North Central Division:			
Missouri	98.8		
West South Central Division:			
Arkansas	43.7		
Women's boots, ankle height or higher, total	232.2	$102.6	+126.3%
New England Division:			
Maine	26.4	nr	
New Hampshire	44.1	19.3	+128.5
Massachusetts	23.7	5.6	+323.2
Middle Atlantic Division:			
Pennsylvania	18.7	10.6	+ 76.4
East South Central Division:			
Tennessee	38.2	nr	
Pacific Division:			
California	16.7	2.9	+475.9
Women's sandals, total	102.8	**	
New England Division:			
New Hampshire	6.8		
Middle Atlantic Division:			
New York	9.6		
Pennsylvania	15.3		
West North Central Division:			
Missouri	8.5		
Pacific Division:			
California	31.1		

nr = not reported

* 1972 shipment value by geographic area not available.

** 1972 shipment value not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-I-31A.

SHIPMENTS

By Price Line

Percentage Distribution of Selected Types of Footwear Shipments by Price Range (Wholesale Price Per Pair) 1978-1980

	U.S. Producers			U.S. Importers		
	1980	1979	1978	1980	1979	1978
Leather footwear						
Men's dress & casual footwear	100%	100%	100%	100%	100%	100%
$10.00 and under	21	21	21	65	57	71
$10.01 to $14.00	18	19	24	16	16	15
$14.01 to $18.00	16	17	25	7	6	4
$18.00 to $28.00	28	29	21	8	10	7
Over $28.00	17	14	9	4	6	3
Men's boots, exc. work boots	100%	100%	100%	100%	100%	100%
$14.00 and under	13	13	14	30	54	93
$14.01 to $18.00	6	6	27	37	25	4
$18.01 to $28.00	47	43	45	27	15	3
Over $28.00	44	48	14	6	6	1
Men's work boots	100%	100%	100%	100%	100%	100%
$18.00 and under	10	11	16	94	88	92
$18.01 to $22.00	32	29	42	4	10	4
$22.01 to $28.00	28	33	28	2	1	2
Over $28.00	30	27	14	-	1	2
Athletic footwear, all types	100%	100%	100%	100%	100%	100%
$7.00 and under	45	31	39	37	28	47
$7.01 to $10.00	14	33	39	31	46	32
Over $10.00	41	36	22	32	25	21
Women's dress & casual footwear	100%	100%	100%	100%	100%	100%
$10.00 and under	18	25	34	62	61	65
$10.01 to $16.00	43	43	57	28	27	31
Over $16.00	39	32	32	10	12	4
Women's sandals	100%	100%	100%	100%	100%	100%
$7.00 and under	15	21	15	55	54	47
$7.01 to $10.00	27	40	42	16	18	24
$10.01 to $13.00	13	13	21	19	11	12
Over $13.00	45	26	22	10	17	16
Women's boots	100%	100%	100%	100%	100%	100%
$16.00 and under	23	8	19	60	39	26
$16.01 to $22.00	14	31	27	14	18	43
$22.01 to $28.00	13	34	38	16	31	23
Over $28.00	50	27	16	10	12	8

(continued)

SHIPMENTS

By Price Line

Percentage Distribution of Selected Types of Footwear Shipments by Price Range (Wholesale Price Per Pair) 1978-1980
(continued)

	U.S. Producers			U.S. Importers		
	1980	1979	1978	1980	1979	1978
Rubber/plastics footwear						
Men's dress & casual footwear	100%	100%	100%	100%	100%	100%
$7.00 and under	27	28	35	94	88	92
Over $7.00	73	72	65	6	12	8
Women's dress & casual footwear	100%	100%	100%	100%	100%	100%
$7.00 and under	18	22	30	83	68	86
Over $7.00	82	78	70	17	32	14

NOTE: Compiled from data submitted in response to questionnaires of the USITC. The data reported for 1978 and 1979 represent approximately 51% of total U.S. shipments and 58% of U.S. importers' shipments. Data reported for 1980 represent approximately 54% of total U.S. shipments and 58% of U.S. importers' shipments.

Source: Selected from U.S. International Trade Commission Publications 1139, Nonrubber Footwear, April 1981.

Seasonal Pattern

Percent of Year's Total Shipments of Footwear by Months, 1978-1980
(Based on Pairage Shipped by U.S. Manufacturers)

	Nonrubber Footwear			Footwear With Sole Vulcanized to Fabric Upper*	Rubber & Plastic Protective Footwear*
	1980	1979	1978	1979(r)	1979(r)
Year	100.0%	100.0%	100.0%	100.0%	100.0%
January	8.6	8.8	7.7	9.4	9.4
February	8.6	8.5	7.8	9.8	9.2
March	8.7	9.2	9.3	10.8	10.0
April	8.4	8.3	7.7	9.0	8.2
May	8.4	9.1	8.7	9.5	8.9
June	8.3	8.0	9.0	9.1	8.5
July	7.2	6.7	7.4	6.7	6.4
August	8.4	8.8	9.9	7.0	5.8
September	9.1	8.4	8.7	7.0	7.9
October	9.6	9.3	8.7	7.1	8.9
November	7.5	8.0	8.1	7.1	9.2
December	7.3	7.0	6.9	7.4	7.7

*Data for 1978 and 1980 not available. Data for 1979 represents production.
(r) = revised

Source: Based on reports of U.S. Bureau of the Census, Current Industrial Reports, M31A.

SHIPMENTS

By Class of Customers

Distribution of Sales of Shoes & Slippers by Class of Customer, 1979
(Not Including Rubber/Plastic Footwear)

	Type of Footwear				
	Men's Shoes, Exc.Athletic	Women's Shoes, Exc.Athletic	Athletic Footwear	All Other Footwear	Slippers
Total shipments	100.0%	100.0%	100.0%	100.0%	100.0%
Retail stores & outlets of this company	23.8	18.7	30.7	23.2	5.3
Independent retailers	30.0	35.4	13.3	30.6	22.5
All other retailers	34.5	34.8	23.6	27.8	60.1
Wholesalers	7.9	8.7	31.8	17.6	9.8
All others, incl. govt. and for exports	3.7	2.4	0.5	0.9	2.2
Total sales (mil. $)	$1,773.5	$1,646.9	$185.0	$415.6	$245.0

Source: U.S. Bureau of the Census, Current Industrial Reports, Series MA-31A.

FACTORY PRICES

In the first six months of 1980, the average factory shipping price of shoes was $11.87, an increase of 16.9% from the comparable period of 1979. The estimated average price for all of 1980 was $12.03 a pair, up 13.5% from 1979.

After rising 19.1% in 1979 compared to 1978, producer (or factory) prices of nonrubber footwear increased at a 7.0% rate in 1980. Leather prices, which had risen 49.5% in 1979, declined 12.6% while hides and skins prices, up 48.9% in 1979 due to shortages, dropped 30.9%. These reductions were largely responsible for the stabilization of footwear prices in 1980. Industry sources do not expect another drastic rise in leather prices in the foreseeable future. Rubber footwear, which had increased 7.8% in 1979, rose 3.7% at the factory price level in 1980.

Producer prices of nonrubber footwear rose at an average annual rate of 8.7% between 1974 and 1980, approximately the same as prices for all commodities, according to an International Trade Commission analysis of Bureau of Labor Statistics data. Over the same period, producer prices of imported footwear rose 10.4% annually.

Factory prices of men's and boys' footwear averaged a 9.5% annual gain during the six-year span. Women's and misses' footwear and children's and infants' footwear rose at average annual rates of 8.4% and 5.8%, respectively.

FACTORY PRICES

Footwear Producer (Factory) Price Index, 1978-1980
(1967 = 100)

	Annual Averages			% Change	Monthly Averages July	
	1980	1979	1978	1980/1979	1981	1980
All commodities	268.4	235.5	209.3	+14.0%	296.0	270.4
Hides & skins	370.9	536.7	360.5	-30.9	na	356.6
Cattle hides	366.8	593.8	390.1	-38.2	355.1	348.3
All leather	311.6	356.7	238.6	-12.6	317.4	292.2
Cattle hide leather	315.1	359.2	230.8	-12.3	319.8	294.6
Nonrubber footwear	233.3	218.0	183.0	+ 7.0	241.9	232.7
Men's & boys' footwear	261.5	250.2	207.5	+ 4.5	276.1	259.5
Women's & misses' footwear	217.1	198.5	167.4	+ 9.4	221.5	217.9
Children's & infants' footwear	192.9	178.1	160.6	+ 8.3	199.2	191.0
Rubber footwear	211.9	204.4	189.6	+ 3.7	220.1	216.6

Source: Bureau of Labor Statistics.

Reflecting the downturn in leather prices, gains in footwear prices continued to moderate in 1981. For the January to July period, the Producer Price Index for nonrubber footwear reached 241.9, up 3.9% compared with the same 1980 period.

FOREIGN TRADE

Imports

In 1980 both U.S. production and footwear imports declined from 1979 levels. Imports of nonrubber footwear accounted for 48.9% of the total U.S. market supply last year, compared with 51% in 1979, according to the American Footwear Industries Association. Of the total U.S. market supply of rubber/fabric footwear, imports accounted for 62.8% in 1980, 58.8% in 1979.

Combining the totals for both types of footwear, penetration of the total U.S. market by imported footwear amounted to 51.8% in 1980, down from 52.5% in 1979. Import penetration was heaviest in athletic footwear. Despite a healthy increase in domestic production last year, imports garnered 68.2% of the market—up from 66.3% in 1979—due to a record breaking level of imports.

Imports (continued)

Import penetration in various segments of the nonrubber footwear market has been reported by the AFIA as follows:

Import Penetration of U.S. Nonrubber Footwear Market by Type of Footwear
(Imports as % of Total U.S. Supply)

	1980	1979
Men's	38.5	39.9
Youths' & boys'	39.7	37.6
Women's	58.9	63.8
Misses'	54.7	46.3
Children's	47.0	47.9
Infants'	31.4	30.3
Athletic	68.2	65.3
Slippers*, plastic one-piece sandals, etc.	5.4	4.9

*The import penetration of slippers is estimated to be understated by about 75%.

Source: American Footwear Industries Association based on U.S. Bureau of the Census data.

The Orderly Marketing Agreements with Taiwan and Korea, instituted in 1977, expired in June 1981 and were not renewed. Nonrubber footwear imports for the first four months of 1981, when the OMA's were still in effect, were up 3% over the same period in 1980, while their value increased 2.2%. Imports from the People's Republic of China in this period exceeded their entire 1980 total and were 197% higher than in the first four months of 1980. Nonrubber footwear imports from Taiwan and Korea decreased 6% in quantity.

In the last full year of the OMA's (1980), nonrubber footwear imports from Taiwan and Korea amounted to 181 million pairs, nearly 50% of total imports of this type, but down from 61% prior to the introduction of the quotas. This quantity represented almost 25% of the total nonrubber footwear market supply in the U.S. in 1980. With the elimination of the OMA's, the U.S. government expressed its belief in the ability of the domestic footwear industry to compete with imports and the expectation that the move should lead to lower retail prices on footwear.

In the rubber and plastics footwear industry, imports constituted approximately 63% of the U.S. market in 1980. Starting in July 1981, imports of footwear with fabric uppers and rubber or plastic soles (mostly athletic footwear, but also slippers and other types) will be subject to higher import duties.

Imports of protective footwear fell to a 34% share of the total market in 1979 from 38% in 1978, according to the Department of Commerce.

FOREIGN TRADE

Imports

U.S. Footwear Imports by Type, 1979, 1980

	1980					1979		% Change 1980/1979	
	Pairs (Mil.)	% of Total	Value (Mil.$)	% of Total	Avg. Value Per Pair	Pairs (Mil.)	Value (Mil.$)	Pairs	Value
Footwear, total	510.5	100.0%	$2,925.3	100.0%	$ 5.73	545.2	$2,872.0	- 6.4%	+ 1.8%
Nonrubber footwear, total	326.3	63.9	2,095.5	71.6	6.42	369.3	2,263.0	-11.6	- 7.4
Rubber/plastics footwear, total	184.2	36.1	329.8	28.4	4.50	175.9	609.0	+ 4.7	+ 36.2
Men's & boys', total	146.6	28.7	1,112.5	38.0	7.59	131.8	920.8	+11.2	+ 20.8
Women's & misses', total	265.4	52.0	1,470.9	50.3	5.54	303.8	1,591.1	-12.7	- 7.6
Children's & infants', total	36.8	7.2	107.2	3.7	2.91	37.2	94.5	- 1.0	+ 13.4
Type not specified, total	61.7	12.1	234.7	8.0	3.80	72.3	265.6	-14.7	- 11.6
Dress & casual footwear, total	226.4	44.4	1,512.5	51.7	6.68	265.1	1,721.8	-14.6	- 12.1
Leather uppers, total (N)	99.3	19.5	1,026.1	35.1	10.33	133.8	1,272.6	-25.8	- 19.4
Men's & boys'	25.1	4.9	323.1	11.0	12.88	31.8	382.6	-21.2	- 15.3
Women's & children's	73.3	14.4	690.2	23.6	9.41	101.3	881.2	-27.6	- 21.7
Other, not specified	0.9	0.2	12.9	0.4	13.65	0.7	8.8	+36.4	+ 45.9
Lined vinyl uppers, total (N)	127.1	24.9	486.4	16.6	3.83	131.3	449.1	- 3.2	+ 8.3
Men's & boys'	21.8	4.3	93.4	3.2	4.28	16.5	61.2	+31.8	+ 52.7
Women's & misses'	95.6	18.7	363.9	12.4	3.81	105.1	363.8	- 9.0	+ 0.05
Children's & infants'	9.7	1.9	29.0	1.0	3.00	9.7	24.2	- 0.2	+ 20.0
Athletic, total	175.3	33.9	1,052.5	36.0	6.07	151.4	746.2	+14.5	+ 41.1
Leather uppers, total (N)	45.6	8.9	373.9	12.8	8.20	33.6	258.1	+35.6	+ 44.9
Men's & boys'	36.7	7.2	312.4	10.7	8.51	27.0	212.1	+35.6	+ 47.3
Women's & children's	8.6	1.7	56.5	1.9	6.59	5.6	34.8	+52.7	+ 62.3
Ski boots	0.3	0.06	4.9	0.2	15.31	0.9	11.1	-66.1	- 55.6
Fabric uppers, total (R)	119.7	23.4	606.3	20.7	5.07	111.2	415.3	+ 7.6	+ 46.0
Men's & boys'	44.9	8.8	314.2	10.7	7.00	38.8	200.4	+15.7	+ 56.8
Women's & misses'	38.3	7.5	171.5	5.9	4.47	35.2	112.3	+ 8.9	+ 52.7
Children's & infants'	13.6	2.7	43.7	1.5	3.22	14.7	41.1	- 7.7	+ 6.3
Others, not oxford height	22.9	4.5	76.9	2.6	3.35	22.5	61.5	+ 1.8	+ 24.9
Lined vinyl uppers, total (R)	8.0	1.6	72.4	2.5	9.01	6.6	72.8	+21.6	- 0.6
Men's & boys'	4.0	0.8	18.5	0.6	4.65	3.1	12.9	+29.3	+ 42.8
Women's & misses'	2.4	0.5	9.5	0.3	3.89	1.4	5.1	+72.1	+ 86.7
Children's & infants'	0.5	0.1	1.5	0.05	2.99	0.5	1.1	+ 6.5	+ 30.5
Ski boots	1.0	0.2	42.8	1.5	38.94	1.7	53.6	-35.9	- 20.1

(continued)

Imports

U.S. Footwear Imports by Type, 1979, 1980 (continued)

	1980					1979		% Change 1980/1979	
	Pairs (Mil.)	% of Total	Value (Mil.$)	% of Total	Avg. Value Per Pair	Pairs (Mil.)	Value (Mil.$)	Pairs	Value
Work footwear, leather, total (N)	4.7	0.9%	$ 55.2	1.9%	$ 11.65	5.6	$ 57.8	-16.2%	- 4.6%
Boots & protective footwear, non-leather, total (R)	7.3	1.4	31.1	1.1	4.28	12.1	41.4	-39.9	- 25.0
Other footwear, total	98.7	19.3	274.0	9.4	2.77	110.9	304.7	-11.0	- 10.1
Unsupported rubber or plastic, total (N)	28.5	5.6	112.7	3.8	3.96	22.4	71.2	+27.0	+ 58.3
Men's & boys'	3.5	0.7	15.8	0.5	4.55	2.7	7.0	+29.3	+125.0
Women's & misses'	23.0	4.5	91.8	3.1	3.98	18.1	61.2	+27.4	+ 50.0
Children's & infants'	1.9	0.4	5.0	0.2	2.61	1.6	3.0	+18.7	+ 70.7
Zori (R)	20.7	4.1	7.3	0.2	0.35	23.7	8.2	-12.3	- 10.7
Fiber uppers (N)	14.1	2.8	35.9	1.2	2.55	17.2	38.6	-18.0	- 6.8
Wood (N)	11.9	2.3	70.3	2.4	5.91	20.6	119.3	-42.3	- 41.1
Other (N)	23.5	4.6	47.8	1.6	2.03	27.1	67.5	-12.9	- 29.2

(N) = Nonrubber
(R) = Rubber

*The import value is the wholesale value at the first port of entry in the U.S. It includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise to the U.S.

NOTE: The amount of rubber and nonrubber footwear listed here differs from the amount stated by the Department of Commerce due to classification and definitional differences.

Source: Fairchild Market Research Department
based on Department of Commerce data.

FOREIGN TRADE

Imports

U.S. imports of nonrubber footwear came principally from the seven countries named in the table below. These countries accounted for 85% of the total quantity and 81% of the total value of nonrubber footwear imports.

The decline in the number of imports from Italy is attributed to the decreased popularity of a particular style of women's shoe, a one-piece molded plastic bottom shoe with uppers of leather or various other materials.

Leading Countries of Origin of Nonrubber Footwear, 1979, 1980

	Quantity (Mil. Pairs)		% Change	Value (Mil.$)		% Change	Avg. Value Per Pair	
	1980	1979	1980/1979	1980	1979	1980/1979	1980	1979
Nonrubber footwear:								
Taiwan	144.0	124.9	+ 15.3%	$620.1	$436.1	+42.2%	$ 4.31	$ 3.49
Italy	46.2	97.1	- 52.4	506.5	787.5	-35.7	10.96	8.11
Korea	37.0	24.4	+ 51.6	262.8	166.6	+57.7	7.09	6.83
Brazil	31.3	32.0	- 2.2	239.6	237.2	+ 1.0	7.65	7.41
Hong Kong	20.8	22.1	- 5.9	36.1	36.9	- 2.2	1.74	1.67
Spain	18.0	27.3	- 34.1	173.7	274.6	-36.7	9.64	10.06
Philippines	14.3	13.2	+ 8.3	34.1	34.8	- 2.0	2.39	2.63

Source: U.S. International Trade Commission, Nonrubber Footwear, Publ. No. 1139, April 1981, based on U.S. Department of Commerce data.

FOREIGN TRADE

Imports

Leading Countries of Origin of Rubber Footwear & Footwear With Fabric Uppers & Soles of Rubber/Plastic, 1978, 1979

	Quantity (Mil. Pairs)		% Change	Value (Mil.$)		% Change	Avg. Value Per Pair	
	1979	1978	1979/1978	1979	1978	1979/1978	1979	1978
Rubber footwear:								
Taiwan	67.4	112.5	- 40.1	$153.1	$211.2	- 27.5%	$2.27	$1.88
Korea	51.8	70.7	- 26.7	251.2	300.5	- 16.4	4.85	4.25
Hong Kong	11.4	14.1	- 19.1	6.2	6.7	- 7.5	0.54	0.48
Footwear with fabric uppers & soles of rubber/plastic*:								
Taiwan	53.9	94.8	- 43.1	146.3	202.7	- 27.8	2.72	2.14
Korea	41.9	59.5	- 29.6	213.8	265.8	- 19.6	5.11	4.47
Mainland China	6.4	2.9	+120.7	11.4	2.4	+375.0	1.79	0.86

*The totals for this category are included in the "rubber footwear" classification above.

Source: U.S. International Trade Commission, Summary of Trade and Tariff Information Pub. No. 841, March 1981, based on U.S. Department of Commerce data.

Exports

The value of U.S. exports of all types of footwear rose 57.4% in 1980 to $130.8 million, compared to $83.1 million in 1979. The quantity exported increased to 15.3 million pairs from 11.1 million in 1979, a 37.6% gain. U.S. exports of nonrubber footwear in 1980 were valued at $112.0 million, a 58.9% rise over the 1979 value of $70.5 million. In quantity, nonrubber footwear exports were up 40.3% in 1980 to 13.0 million pairs. The value of nonrubber footwear exports represented 2.6% of domestic shipment value and 3.4% of domestic production.

Since 1977, when the U.S. footwear industry began an aggressive marketing program in conjunction with the Department of Commerce to promote exports, nonrubber footwear exports have jumped 220.0% in value and 141.0% in pairage.

FOREIGN TRADE

Exports

Quantity & Value of Footwear Exports, 1979, 1980

	Quantity (Thous. Pairs)		% Change	Value* (Thous. $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Total, reported categories	15,345.5	11,150.4	+ 37.6%	$130,767	$ 83,091	+ 57.4%
Footwear of leather uppers, nspf, total	3,587.3	3,273.6	+ 9.6	47,536	32,875	+ 44.6
Men's	1,731.1	1,794.4	- 3.5	31,176	23,267	+ 34.0
Women's	1,377.2	1,052.4	+ 30.9	13,112	7,419	- 76.7
Misses', children's & infants'	359.4	299.9	+ 19.8	2,547	1,403	+ 81.5
Youths' & boys'	119.6	126.9	- 5.7	701	786	- 10.8
Athletic footwear, total	3,979.0	2,390.1	+ 66.5	33,527	22,073	+ 51.9
Leather uppers	790.9	709.1	+ 7.3	12,246	7,787	+ 57.3
Athletic footwear, nspf	3,218.1	1,681.0	+ 91.4	21,281	14,286	+ 49.0
Protective footwear of rubber or plastic, total	654.3	670.0	- 2.3	5,856	4,275	+ 37.0
Footwear with textile uppers & rubber or plastic outer soles, total	1,692.6	1,218.4	+ 38.9	12,907	8,338	+ 54.8
Slippers, total	798.3	758.7	+ 5.2	3,750	2,227	+ 68.4
Leather uppers	198.1	413.8	- 52.1	1,624	1,279	+ 27.0
Slippers, nspf	600.2	344.9	+ 74.0	2,126	948	+124.3
Footwear, nspf, total	4,634.0	2,839.6	+ 63.2	27,191	13,303	+104.4
Men's	1,825.1	786.3	+137.5	12,332	5,300	+132.7
Women's	1,982.5	1,183.0	+ 67.6	11,407	5,506	+107.2
Misses', children's & infants'	580.8	734.6	- 20.9	2,477	1,870	+ 32.5
Youths' & boys'	245.6	153.7	+ 59.8	975	627	+ 55.5

*This value represents the export value at the U.S. port of export, based on the transaction price including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance and other charges or transportation cost beyond the port of exportation.

nspf = not specially provided for.

Source: U.S. Department of Commerce,
U.S. General Exports FT 410,
December 1980, 1979.

FOREIGN TRADE

Exports

Argentina replaced Canada in 1980 as the major market for U.S.-produced nonrubber footwear. Exports to Argentina increased 361.2% to 2.5 million pairs. Athletic footwear accounted for approximately 80% of the total. Because of restrictions on the importation of footwear imposed by the Canadian government, U.S. footwear exports to Canada declined 28.2% in 1980, although their value increased 16.8% over 1979. Nonrubber footwear exports to North, South and Central American countries represented 47% of the value and 68% of the quantity of total exports of nonrubber footwear from the U.S.

Leading Countries of Importation of U.S.-Made Nonrubber Footwear, 1979, 1980

	Quantity (Thous. Pairs)		% Change	Value (Thous. $)		% Change	Avg. Value Per Pair	
	1980	1979	1980/1979	1980	1979	1980/1979	1980	1979
Nonrubber footwear, total	12,999	9,262	+ 40.3%	$112,003	$70,478	+ 58.9%	$ 8.62	$ 7.61
Argentina	2,532	549	+361.2	10,702	2,440	+338.6	4.23	4.44
Canada	1,435	2,000	- 28.2	12,151	10,400	+ 16.8	8.47	5.20
Mexico	1,031	598	+ 72.4	5,922	3,255	+ 81.9	5.74	5.44
Japan	546	496	+ 10.1	12,443	7,808	+ 59.4	22.78	15.74
France	533	232	+129.7	7,341	2,918	+151.6	13.77	12.58

Source: U.S. International Trade Commission, Nonrubber Footwear Pub. No. 1139, April 1981, based on U.S. Department of Commerce data.

MARKET SUPPLY

Summary of the Total Market Supply of Footwear in the U.S., 1978-1980

	Quantity (Mil. Pairs)			Value (Mil. $)		
	1980(p)	1979	1978	1980(p)	1979	1978
Footwear, total						
Domestic shipments*	487.1	510.4	517.7	$ na	$4,746.2	$4,196.3
U.S. exports	15.3	11.2	8.1	130.8	83.1	51.6
Shipments to Puerto Rico	7.7	8.4	6.7	38.5	44.7	42.1
U.S. imports	510.5	545.2	589.6	2,925.3	2,872.0	2,638.2
Shipments from Puerto Rico	22.8	18.5	17.7	172.0	116.4	94.5
Market supply	997.4	1,054.5	1,110.2	na	7,606.8	6,835.3
Nonrubber footwear, total						
Domestic shipments	389.6	402.6	412.9	4,532.4	4,266.0	3,789.3
U.S. exports	13.0	9.3	6.9	112.0	70.5	45.3
Shipments to Puerto Rico	6.6	7.2	5.9	35.0	41.3	39.2
U.S. imports	326.3	369.3	344.2	2,095.5	2,263.0	1,927.7
Shipments from Puerto Rico	19.6	16.2	16.7	153.2	104.1	90.0
Market supply	715.9	771.6	761.0	6,634.1	6,521.3	5,722.5
Rubber/plastics footwear, total (incl. sole vulcanized to fabric upper footwear)						
Domestic shipments**	97.5	107.8	104.8	na	480.2	407.0
U.S. exports	2.3	1.9	1.2	18.8	12.6	6.3
Shipments to Puerto Rico	1.1	1.2	0.8	3.5	3.4	2.9
U.S. imports	184.2	175.9	245.4	829.8	609.0	710.5
Shipments from Puerto Rico	3.2	2.3	1.0	18.8	12.3	4.5
Market supply	281.5	282.9	349.2	na	1,085.5	1,112.8

*Includes domestic production of rubber/plastics footwear in 1980 only.
**For 1980, figure represents domestic production rather than shipments.
(p) = preliminary.

Source: Fairchild Market Research Department based upon U.S. Department of Commerce data.

MARKET SUPPLY

Nonrubber Footwear Supply Per Capita, 1971, 1975-1980

Year	Millions of Pairs U.S. Shipments	 Exports	 Imports	Market Supply (Mil. of Pairs)	Resident Population (Mil.)	Per Capita Consumption (No. of Pairs)
1971	552.1	2.1	286.6	818.6*	205.1	4.0
1975	419.2	4.6	287.8	702.4*	212.2	3.3
1976	424.9	6.0	370.0	788.9*	214.0	3.7
1977	430.9	5.4	368.1	793.6*	215.6	3.7
1978	412.9	6.9	373.5	790.3	217.4	3.5
1979	402.6	9.3	404.6	806.9	219.2	3.7
1980	389.6	13.0	365.7	755.3	221.2	3.4

*Does not include shipments between the U.S. and Puerto Rico.

Source: Fairchild Market Research Department based on Department of Commerce data.

RETAIL TRADE

The Retail Market

The fastest growing segment of the U.S. population is to be found in the age group 35 to 59 years of age, particularly those age 35 to 44. By the year 2000 there will be an increase of over 50% in the number of adults 35 to 59 and they will represent better than one out of three in the total population.

Next in terms of percentage gain is the 60-and-over group, which will show an increase of about 18% by the year 2000. They will still be outnumbered by men and women in the 20 to 34 age group, however, although this age group and the population in the 15 to 19 category will decline in number by the year 2000 compared with 1980.

U.S. Population by Sex & Age, 1980 & Projections for 1985, 2000*

	Number (Thous.) 1980	 1985	 2000	% Change 2000/1980	% of Total 1980	 1985	 2000
U.S. total	226,506	232,880	260,378	+14.9%			
Male, total	110,032	113,366	126,588	+15.0	100.0%	100.0%	100.0%
Under 5 yrs.	8,360	9,632	9,153	+ 9.5	7.6	8.5	7.2
5 to 9 yrs.	8,537	8,324	9,738	+14.1	7.8	7.3	7.7
10 to 14 yrs.	9,315	8,471	10,329	+10.9	8.5	7.5	8.2
15 to 19 yrs.	10,752	9,150	10,069	- 6.3	9.8	8.1	8.0
20 to 34 yrs.	29,039	30,142	25,662	-11.6	26.4	26.6	20.3
35 to 59 yrs.	29,057	31,650	44,115	+51.8	26.4	27.9	34.8
60 & over	14,972	15,998	17,521	+17.0	13.6	14.1	13.8
Female, total	116,473	119,514	133,790	+14.9%	100.0%	100.0%	100.0%
Under 5 yrs.	7,984	9,171	8,699	+ 9.0	6.9	7.7	6.5
5 to 9 yrs.	8,159	7,936	9,262	+13.5	7.0	6.6	6.9
10 to 14 yrs.	8,926	8,096	9,824	+10.1	7.7	6.8	7.3
15 to 19 yrs.	10,410	8,857	9,658	- 7.2	8.9	7.4	7.2

(continued)

The Retail Market

U.S. Population by Sex & Age, 1980 & Projections for 1985, 2000*
(continued)

	Number (Thous.)			% Change	% of Total		
	1980	1985	2000	2000/1980	1980	1985	2000
Female, total (cont'd.)							
20 to 34 yrs.	29,349	30,226	25,686	-12.5%	25.2%	25.3%	19.2%
35 to 59 yrs.	30,986	33,305	46,210	+49.1	26.6	27.9	34.5
60 & over	20,658	21,922	24,449	+18.3	17.7	18.3	18.3

*Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Note: Columns may not add to 100.0% due to rounding.

Source: U.S. Bureau of the Census, 1980 Census of Population and Current Population Reports, Series P-25, No. 704.

Consumer Expenditures

Consumer expenditures for footwear—measuring the value at retail of all footwear reaching consumers (nonmilitary) through any channel—amounted to $17.3 billion in 1980. This represented a gain of 7.4% over the 1979 total of $16.1 billion. In the first quarter of 1981 spending for footwear was at an annual rate of $19.0 billion, gaining 5.7% over the 4th quarter 1980 annual rate.

The share of total disposable income represented by footwear expenditures amounted to 0.9% in 1980, down slightly from 1.0% in 1979. Footwear spending accounted for 14.6% of total expenditures for apparel and footwear in 1980 compared with 14.9% in 1979.

Consumer Income & Expenditures for Apparel & Footwear
(Billions of Dollars)

	1980(p)	1979(r)	1978(r)
Disposable personal income	$1,821.7	$1,641.7	$1,462.9
Consumer expenditures for all goods and services	1,672.8	1,510.9	1,348.7
Clothing & footwear, total	104.7	98.9	91.9
Clothing:			
Women's & children's	57.2	54.0	50.3
Men's & boys'	30.1	28.6	26.8
Footwear, total	17.3	16.1	14.7
Women's & children's (e)	10.0	9.4	8.4
Men's & boys' (e)	7.3	6.7	6.3

(p) = preliminary (r) = revised (e) = estimated

Note: The value of clothing and footwear issued to military personnel is not included.

Source: U.S. Department of Commerce, Bureau of Economic Analysis.

RETAIL TRADE

Consumer Expenditures

Measured in terms of a constant value (1972) dollar, consumer spending for footwear in 1980 was valued at $11.3 billion, showing a "real" loss of 0.5% compared with the 1979 constant dollar spending total.

Consumer Expenditures for Footwear
(In Billions of 1972 Dollars)

1980	1979	1978(r)	1977(r)	% Change 1980/1979
$11.3	$11.4	$11.2	$11.3	- 0.5%

On a dollar basis, shoe sales through all types of retail outlets in 1980 were up about 7% compared with 1979. This gain, however, was due primarily to higher prices; unit sales were generally below the year ago levels. Per capita consumption of shoes slipped from 4.4 pairs in 1979 to 4.2 pairs in 1980, on the average.

Much of the loss in units, according to the Footwear Council, was traceable to a drop in demand for fashion boots and for rubber/canvas shoes—markets which peaked in 1979. Hopes for sales gains in 1981 are centered on women's boots, which retailers hope will enjoy a fashion revival, as well as on closed dressy shoes for women with new decorative touches.

Shoe store business was fairly good in the first quarter of 1981, registering a gain of 12% over the same period of 1980 on a seasonally adjusted basis. Shoe promotions and special sales have been stepped up this year, with the best sales gains resulting in junior shoe business.

A Footwear News survey among 25 junior footwear manufacturers and importers found that strategies to reach and satisfy the junior market are undergoing a change. The market, which tended to be viewed as a narrow age bracket of 15 to 25 years of age, is now being broadened in definition to encompass older women who share with younger customers a strong sense of fashion as well as brand and price consciousness. In this group, shoes are a status symbol and rate high on the young women's shopping list.

Children's shoe business has gone from almost 100% in basics to fad and fashion in recent years—meaning for the stores higher inventories, more risks and more markdowns. Department stores and independents have found it difficult to operate in this framework and have lost sales share in children's footwear to booteries, concept stores and discounters. Children's shoes styles as athletic footwear are becoming more important.

In both men's and women's footwear the growing preference of customers for a more casual, more mobile lifestyle is reflected in the stronger sales performance of casual shoes compared with dress shoes. Growing increasingly accustomed to the look and comfort of athletic shoes, many customers will settle for casual shoes for a wide range of uses, attracted by economy as well as by comfort and the "look."

(continued)

Athletic Footwear

In recent years American consumers shifted their preference from traditional sneakers and tennis shoes to joggers and other athletic shoes for specific sports, such as racquetball and soccer. The fabric upper/rubber or plastics soled segment of the athletic footwear market consists of (1) higher priced, quality athletic shoes for specific sports and (2) low cost joggers and other athletic shoes and sneakers intended primarily for casual wear.

The booming market for athletic shoes tapered off in 1980. According to a report on 1980 sales compiled by the National Sporting Goods Association, unit sales of athletic footwear rose 6% compared with 1979. However, sales of running shoes registered a 4% decline in units and the gym shoe/sneaker category dropped 30%. Basketball shoe sales in terms of units climbed 10% and soccer shoe sales were up 8% in 1980 compared with 1979.

According to SPORTSTYLE (April 20, 1981), the trend is toward leisure, walking and multi-purpose footwear. Court shoes, particularly basketball styles, are replacing running shoes in popularity, reflecting the economy—they cost less and last longer—as well as diminished interest in jogging. Court shoes are also more versatile and can be worn with many of the new fashion looks.

Based on studies conducted by the Market Research Corporation of America which tracked purchases reported by a consumer panel of 7,500 households, the total active footwear market was valued at $1.170 billion in 1979, according to SPORTSTYLE. (April 21, 1980). In the first half of 1980, the market was valued at close to $700 million, of which sales to women accounted for 51.8%. (SPORTSTYLE, September 22, 1980).

The percent of 1980 athletic footwear customers who bought their shoes in each type of retail outlet, according to Market Research Corporation of America (MRCA) data compiled for SPORTSTYLE (April 20, 1981 issues) was reported as follows:

Percent of Reported Purchases of Athletic Footwear (Not Including Team Sales)
By Type of Outlet, 1980

Retail Outlet Type	Women's	Men's
Total	100.0%	100.0%
Sporting goods stores	23.6	32.1
Discount stores	10.3	12.8
Department stores	7.8	5.9
Mail order chains (Sears, Ward, Penney)	7.3	5.1
Independent shoe store chains*	7.0	1.8
Specialty stores**	4.8	10.6
Mail order	1.9	2.0
Regional chains***	0.5	1.8
Other outlets	36.8	27.9

Stores are defined by MRCA as follows:

* Includes such groups as Kinney but not such footwear chains as Athletic Attic.

** Includes men's and women's apparel stores and also any apparel outlet not specifically defined by the consumer in the purchase diary.

*** Smaller department stores.

RETAIL TRADE

Consumer Price Trends

Price increases in footwear at the retail level began to moderate after the first quarter of 1980, reflecting the sharp drop in prices of raw hides and skins, which brought leather prices down more than 25% in 1980.

For the year 1980, the Consumer Price Index on footwear averaged 7.7% higher than in 1979. In the three months ending April 1981, the seasonally adjusted annual rate in the price index was 5.4% over the same period of 1980. Prices for men's footwear showed an average increase of 6.2% for the year 1980, women's were up 5.4%; boys' and girls' footwear, up 9.3%.

Consumer Price Index On Footwear
(For All Urban Consumers)
(1967 = 100)

Year	Annual Average
1978	163.8
1979	176.7
1980	190.3

Source: U.S. Bureau of Labor Statistics.

As of May 1981 consumer prices for footwear were up 0.9% over the previous month and rose 6.2% over May 1980. Consumer prices for men's footwear were up 0.8% for the month and 6.5% for the year; boys' and girls' footwear prices were up 0.9% for the month and 6.6% for the year. Women's footwear prices were up 0.9% in May 1981 compared with the previous month and were 5.7% higher than in May 1980.

Price increases in 1981 are expected to be relatively modest in view of plunging prices in steer hides. On the other hand, prices of nonleather shoe parts are continuing to rise. Increases of at least 10% are expected for 1981 in the prices of findings (linings, cement, heels, etc.) and a rise of 12% in lasts.

Sales by Area

Based on information compiled for 1979 by the American Footwear Industries Association on retail sales of footwear by states, the biggest share of volume was concentrated in the East North Central States (19%), followed by the Middle Atlantic States (17.4%).

Distribution of Footwear Retail Sales by Area

Total U.S.	100.0%
New England (Conn., Me., Mass., N.H., R.I., Vt.)	5.3
Middle Atlantic (N.J., N.Y., Pa.)	17.4
East North Central (Ill., Ind., Mich., Ohio, Wis.)	19.0
West North Central (Ia., Kans., Minn., Mo., Nev., N.D., S.D.)	8.0
South Atlantic (Del., D.C., Fla., Ga., Md., N.C., S.C., Va., W. Va.)	15.5
East South Central (Ala., Ky., Miss., Tenn.)	5.7
West South Central (Ark., La., Okla., Tex.)	10.7
Mountain (Ariz., Colo., Id., Mont., Nev., N.M., Utah, Wyo.)	3.8
Pacific (Calif., Ore., Wash., Alas., Haw.)	14.6

Sales by Area

Footwear Sales In 25 Leading Metropolitan Areas, 1979

		Total Footwear Sales (All Outlets)			Footwear Sales In Shoe Stores & Other Apparel Specialty Stores*
Rank	Metropolitan Area	Mil. $	% of U.S. Total	% Change 1979/1978	(Mil. $)
1	New York	$655.4	4.8%	+10.4%	$479.4
2	Chicago	569.4	4.1	+ 0.3	339.6
3	Los Angeles-Long Beach	463.6	3.4	- 4.4	286.3
4	Detroit	322.7	2.3	+12.7	203.9
5	Philadelphia	303.2	2.2	+ 4.6	197.1
6	Boston-Lowell-Brockton-Lawrence-Haverhill	274.3	2.0	+15.8	170.2
7	Houston	255.1	1.8	+ 9.8	152.1
8	Dallas-Fort Worth	234.5	1.7	+20.4	134.8
9	Washington, D.C.	234.2	1.7	+10.8	150.6
10	San Francisco-Oakland	208.0	1.5	- 9.8	126.1
11	Nassau-Suffolk	185.6	1.3	+17.9	128.0
12	St. Louis	160.6	1.2	+13.2	87.3
13	Pittsburgh	157.1	1.1	+16.0	85.7
14	Minneapolis-St. Paul	154.0	1.1	+ 7.7	72.3
15	Atlanta	134.3	1.0	+ 9.0	70.7
16	Miami	132.4	1.0	+10.8	86.2
17	Anaheim-Santa Ana-Garden Grove	125.4	0.9	+ 2.7	68.0
18	Baltimore	123.9	0.9	+16.9	81.2
19	Cleveland	122.8	0.9	+11.0	69.0
20	Newark	122.6	0.9	+10.8	97.3
21	Seattle-Everett	121.1	0.9	+ 1.2	73.9
22	San Diego	109.5	0.8	+10.5	60.4
23	Kansas City, Mo.	107.4	0.8	+ 7.7	57.8
24	Denver-Boulder	106.4	0.8	+ 3.0	60.9
25	New Orleans	101.9	0.7	- 2.1	58.8
25 METRO TOTAL		$5,485.4	39.8%	+ 7.0%	$3,397.6
TOTAL, U.S.		$13,762.4	100.0%	+ 8.9%	$8,094.0

*Includes sales in shoe stores as well as apparel specialty stores such as men's and women's clothing stores and family clothing stores.

Source: Based on Sales & Marketing Management "Survey of Buying Power," 1980.

RETAIL TRADE

Sales By Type of Outlet

Estimates on footwear sales by types of retail outlets, including only stores with payroll, have been compiled by the American Footwear Industries Association. Projections for 1982 show a bigger share of the market for department stores and for mail order houses, while general merchandise stores, shoe stores and apparel stores lost some of the percentage share of the total market.

Total sales of footwear in retail outlets with payroll (excludes the mama-papa stores) reached an estimated total of $12.4 billion in 1978, according to AFIA, and were projected to $16.0 billion by 1982.

Percent of Total Footwear Sales
By Type of Retail Outlet With Payroll, Estimated 1980, Projected 1982

	1980	1982
Total	100.0%	100.0%
Shoe stores	49.0	48.9
Department stores	30.3	30.7
Apparel stores	11.0	10.8
General merchandise stores	2.9	2.5
Variety stores	1.9	1.5
Mail order	2.0	2.3
All other	2.9	3.3

Source: AFIA

A report on footwear sales in terms of pairage, compiled by the Footwear Council and Chain Store Age, indicated that the big general merchandisers, including department stores, Sears, Ward and Penney, accounted for 30% of total 1980 sales. Shoe chains followed, with a 28% share of sales in terms of pairs; discounters and variety stores, 22%, independent shoe stores and apparel stores, 12%; general stores, 8%.

Official figures, based on a nationwide census of stores, on footwear sales by type of outlet is collected every five years by the U.S. Bureau of the Census. The latest information available is based on the 1977 Census and was published by the Bureau in September 1980.

Following are tables covering footwear sales by outlet type reported in the census (covering only stores with payrolls), as well as detailed information profiling shoe stores, as reported in the 1977 Census of Retail Trade.

Sales By Type of Outlet

Total Footwear (Except Infants' & Toddlers') Sales by Type of Retail Outlet, 1972, 1977

(Includes only stores with payroll)

	1977				1972			
	Stores		Sales		Stores		Sales	
	Number	%	Mil. $	%	Number	%	Mil. $	%
Footwear sales, all outlets	97,792	100.0%	$10,649.5	100.0%	93,565	100.0%	$7,672.6	100.0%
Store types:								
Gen. mdse. stores, total	30,509	31.2	3,547.5	33.3	32,753	35.0	2,692.0	35.1
Dept. stores	8,507	8.7	3,045.1	28.6	7,492	8.0	2,255.7	29.4
Other gen. mdse. stores	22,002	22.5	502.4	4.7	25,261	27.0	436.3	5.7
Shoe stores	24,450	25.0	5,219.7	49.0	23,390	25.0	3,669.0	47.8
Men's shoe stores	3,306	3.4	653.0	6.1	2,583	2.8	416.1	5.4
Women's shoe stores	4,934	5.1	1,175.9	11.0	5,077	5.4	838.1	10.9
Children's shoe stores	901	0.9	136.1	1.3	803	0.9	96.8	1.3
Family shoe stores	15,309	15.6	3,254.6	30.6	14,927	15.9	2,318.1	30.2
Other apparel/accessories specialty stores	23,620	24.1	1,304.1	12.2	21,624	23.1	965.0	12.6
Other retail stores	15,491	15.8	340.3	3.2	12,376	13.2	171.9	2.2
Sporting goods stores								
Gen. line	3,114	3.2	157.1	1.5	nr	--	nr	--
Specialty line	1,185	1.2	25.9	0.2	374	0.4	4.9	0.1
Non-store retailers								
Mail order houses	3,671	3.7	208.2	2.0	3,376	3.6	141.7	1.8
Direct selling estabs.	51	*	30.1	0.3	46	*	33.0	0.4

nr = not reported
* Less than 0.1%

NOTE: Each business location is separately counted as a store unit, including each unit in a multi-unit organization. Department store discount operations and outlets operated by mail order chains which meet the Standard Industrial Classification definition for a department store are included in that store classification.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

Sales of footwear by category (men's, women's and children's) were reported in the 1977 census reports for the major outlet types. The total analyzed by outlet type represented a total of $9.720 billion in sales, or 91.3% of total footwear sales in all outlets with payrolls.

Reported data by footwear category are shown in the following tables.

In the above table, the total for footwear sales includes footwear accessories (such as laces, polishes, etc.), reported at $238 million in 1977. Shoe stores accounted for 61.8% of this total; department stores, 32.6%.

Sales By Type of Outlet

Contribution of Footwear To Total Store Sales, 1977
(Selected Outlet Types)

	No. of Stores Selling Item	Sales of Item		
			% of Total Store Sales	
		Mil. $	Stores Selling Item	All Stores of This Type*
Department stores				100.0%
Footwear, exc. infants' & toddlers'	8,507	$3,045.1	4.1	4.0
Men's & boys' footwear	8,114	1,058.3	1.5	1.4
Women's & girls' footwear	8,364	1,612.4	2.2	2.1
Children's footwear	5,872	296.9	0.5	0.4
Footwear accessories	4,584	77.5	0.2	0.1
Shoe stores				
Men's shoe stores:				
Footwear, exc. infants' & toddlers'	3,306	653.0	97.6	97.6
Men's & boys' footwear	3,306	621.3	92.8	92.8
Women's shoe stores:				
Footwear, exc. infants' & toddlers'	4,934	1,175.9	92.1	92.1
Women's & girls' footwear	4,934	1,096.8	85.9	85.9
Children's & juveniles' shoe stores				
Children's footwear, (not incl. infants' & toddlers')	901	128.8	90.7	90.7
Apparel specialty stores:				
Men's & boys' wear stores				
Footwear, exc. infants' & toddlers'	7,084	270.1	8.5	3.9
Women's ready-to-wear stores				
Footwear, exc. infants' & toddlers'	4,384	366.4	10.7	3.0
Family clothing stores				
Footwear, exc. infants' & toddlers'	10,184	615.4	10.0	7.8
Men's & boys' footwear	9,776	293.1	5.0	3.7
Women's & girls' footwear	8,840	264.7	4.7	3.4
Children's footwear	4,366	48.5	2.1	0.6
Footwear accessories	8,848	103.0	1.8	1.3

*The first column covers the percent of total sales of only those stores that sell the footwear type listed. The second column covers the percent of total sales of all stores of the type listed represented by specified footwear—some of which do not carry footwear in all cases.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977, (MC77-L).

Sales By Type of Outlet

Retail Sales of Specified Footwear Categories by Type of Retail Outlet, 1977
(Includes only stores with payroll)

	Stores		Sales	
Men's & Boys' Footwear	No.	%	Mil. $	%
Total	49,124	100.0%	$3,550.8	100.0%
Store types reporting sales:				
Department stores	8,114	16.5	1,058.3	29.8
Shoe stores, total	19,943	40.6	1,848.3	52.0
Men's shoe stores	3,306	6.7	621.3	17.5
Women's shoe stores	1,150	2.3	30.0	0.8
Children's shoe stores	187	0.4	2.6	0.1
Family shoe stores	15,300	31.1	1,194.4	33.6
Apparel specialty stores:				
Men's & boys' wear stores	7,011	14.3	245.4	6.9
Women's ready-to-wear stores	667	1.4	20.5	0.6
Family clothing stores	9,776	19.9	293.1	8.3
Mail order houses	3,613	7.3	85.2	2.4
Women's & Girls' Footwear				
Total	46,793	100.0%	$4,907.2	100.0%
Store types reporting sales:				
Department stores	8,364	17.9	1,612.4	32.9
Shoe stores, total	20,775	44.4	2,576.1	52.5
Men's shoe stores	323	0.7	6.1	0.1
Women's shoe stores	4,934	10.5	1,096.8	22.3
Children's shoe stores	218	0.5	3.0	0.1
Family shoe stores	15,300	32.7	1,470.2	30.0
Apparel specialty stores:				
Men's & boys' wear stores	960	2.0	15.9	0.3
Women's ready-to-wear stores	4,223	9.0	331.8	6.8
Family clothing stores	8,840	18.9	264.7	5.4
Mail order houses	3,631	7.8	106.3	2.2
Children's Footwear (not incl. infants' & toddlers')				
Total	30,393	100.0%	$1,024.6	100.0%
Store types reporting sales:				
Department stores	5,872	19.3	296.9	29.0

(continued)

Sales By Type of Outlet

Retail Sales of Specified Footwear Categories by Type of Retail Outlet, 1977

(Includes only stores with payroll)
(continued)

	Stores		Sales	
	No.	%	Mil. $	%
Children's Footwear (continued)				
Shoe stores, total	15,920	52.4%	$ 648.3	63.3
Men's shoe stores	428	1.4	6.1	0.6
Women's shoe stores	1,076	3.5	26.6	2.6
Children's shoe stores	901	3.0	128.8	12.6
Family shoe stores	13,515	44.5	486.8	47.5
Apparel specialty stores				
Men's & boys' wear stores	575	1.9	4.5	0.4
Women's ready-to-wear stores	543	1.8	12.6	1.2
Family clothing stores	4,366	14.4	48.5	4.7
Mail order houses	3,117	10.2	13.8	1.4

NOTE: Columns may not add to 100.0% due to rounding.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977, (MC77-L).

Shoe Stores

The 1977 Census of Retail Trade indicated that shoe stores have been increasing their share of total footwear business. They have also been increasing in number. While the count on shoe firms has declined, there are more shoe stores because of the growth of multi-unit operations. Sales are now more highly concentrated among the larger shoe store firms.

In the five-year period 1972 through 1977, the number of companies operating shoe stores declined 1.5%, dropping from 15,219 to 14,985. However, the number of shoe stores operated showed a 3.9% increase while dollar sales rose about 39%. Family shoe stores—selling footwear for men, women and children—were the dominant type of shoe outlet, with about 62% of the shoe store business. The fastest growth since 1972, however, was reported for men's shoe stores, which rose 28% in number of stores, 51% in sales volume in 1977 compared with 1972.

RETAIL TRADE

Shoe Stores

Trends in the Number of Shoe Stores in the U.S.

	Number			Sales (Mil. $)		
	1977	1972	% Change	1977	1972	% Change
Shoe store firms	14,985	15,219	- 1.5%			
Shoe stores, all types, total	27,891	26,850	+ 3.9	$5,650.2	$4,074.6	+38.7%
Stores with payroll*						
Total shoe stores with payroll	24,450	23,390	+ 4.5	5,517.2	3,972.3	+38.9
Family shoe stores	15,309	14,927	+ 2.6	3,428.5	2,481.5	+38.2
Women's shoe stores	4,934	5,077	- 2.8	1,277.3	944.6	+35.2
Men's shoe stores	3,306	2,583	+28.0	699.4	443.4	+51.0
Children's shoe stores	901	803	+12.2	142.0	102.9	+38.0

*Detailed information by type of shoe store was reported only for stores with one or more paid employees, as shown.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

The greatest percentage of shoe store firms are small operations, with annual volume under $500,000, but in 1977 close to 70% of all shoe store sales was concentrated among the 1,065 firms (7.1% of the total) with sales of $500,000 and up. These larger firms operated 13,237 shoe stores or 47.5% of all shoe stores.

Distribution of Shoe Stores by Sales Volume

	1977			1972		
	Firms	Stores	Sales	Firms	Stores	Sales
Total	14,985	27,891	$5,650.2	15,219	26,850	$4,074.6
Percent	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual sales—						
$500,000 & over	7.1	47.5	69.8	4.5	41.3	61.8
$100 mil. & over	*	19.6	28.6	*	13.0	22.2
$15 - $99.9 mil.	0.1	11.4	15.5	0.1	13.4	(D)
$5 - $14.9 mil.	0.3	4.8	6.5	0.2	5.0	(D)
$1 - $4.9 mil.	2.3	7.0	11.2	1.4	5.5	9.7
$0.5 - $0.9 mil.	4.4	4.7	8.0	2.8	4.4	7.2
Under $500,000	92.9	52.5	30.2	95.5	58.7	38.2

*Less than 0.1%
(D) Figures withheld by Census Bureau to avoid disclosure of individual operations.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

Shoe Stores

While there were close to 15,000 shoe store companies in operation in 1977 (including both single unit and multi-unit operations), the 50 largest firms operated 34.4% of the shoe stores and controlled almost half of total shoe store sales.

Sales Concentration Among Shoe Retailing Firms

	Stores		Sales	
	1977	1972	1977	1972
Total shoe stores operated by all firms	100.0%	100.0%	100.0%	100.0%
Operated by the				
4 largest firms	13.3	11.6	22.8	19.6
8 largest firms	21.0	18.3	30.4	27.6
20 largest firms	29.6	25.9	42.1	37.7
50 largest firms	34.4	31.1	48.6	44.5

A comparison of 1977 and 1972 censuses of retail trade reports, issued by the U.S. Census Bureau, shows the growing concentration of shoe store business among multi-unit companies with six or more stores. Chains of this size accounted for close to 57% of total shoe store business while representing 41.3% of total stores. In 1972 chains of six or more shoe stores had 37.4% of all shoe stores and accounted for 51.5% of total shoe store business. Stores in chains of 11 or more stores had 38.3% of the stores in 1977 and accounted for 51.9% of sales. Comparable figures for 1972 were 34.5% and 47.7%, respectively.

Single vs. Multi-Unit Shoe Stores: Sales Share

	Firms		Stores		Sales*		% Increase in Sales
	1977	1972	1977	1972	1977	1972	1977/1972
Total	14,985	15,219	27,891	26,850	$5,576.8	$3,982.0	+ 40.0%
Percent	100.0	100.0	100.0	100.0	100.0	100.0	--
Single units	92.0	91.5	49.4	51.9	32.3	36.0	25.7
2 - 3 store organizations	5.4	5.9	6.6	7.5	7.8	8.8	23.9
4 - 5 store organizations	1.1	1.3	2.7	3.2	3.2	3.7	21.6
6 - 10 store organizations	0.8	0.7	3.0	2.9	4.8	3.8	77.4
11 or more store organizations	0.7	0.6	38.3	34.5	51.9	47.7	52.3

*Dollar figures are in millions.

Source: Fairchild Market Research Department based on U.S. Bureau of the Census, Census of Retail Trade, 1972, 1977

(continued)

Shoe Stores

Shoe stores showed a greater concentration of business in their chief category, footwear, despite the fact that many more stores had diversified their stocks in 1977 compared with 1972.

Among family shoe stores, for example, the percentage of stores reporting sales of men's wear items—particularly hosiery—jumped from 5.9% of the stores in this classification in 1972 to over 20% in 1977. Sales of men's wear items other than footwear contributed 1.2% of total family shoe store business in 1977 compared with 0.4% five years earlier.

A detailed comparison of the merchandise mix of shoe stores of various types in 1977 and in 1972 follows.

Shoe Store Sales: Total & Major Merchandise Classifications

Shoe stores by type & merchandise types carried (selected list)	1977		1972	
	Stores*	Sales**	Stores*	Sales**
Family shoe stores	15,309	$3,428.5	14,927	$2,481.5
Total, all merchandise	100.0%	100.0%	100.0%	100.0%
Footwear	100.0	94.9	100.0	93.4
Men's & boys'	99.9	34.8	100.0	33.3
Women's & girls'	99.9	42.9	99.9	44.9
Children's	88.3	14.2	84.7	15.3
Footwear accessories	72.1	3.0	nr	nr
Men's & boys' clothing & access.	21.7	1.2	5.9	0.4
Women's & girls' clothing & access.	46.4	3.5	44.1	3.2
Hosiery	25.7	0.4	26.9	0.7
Handbags & small leather goods	38.3	1.8	38.8	1.8
Separates & coordinates	1.1	0.1	1.0	0.1
Accessories	0.8	0.1	nr	nr
Other merchandise & receipts	--	0.4	--	3.0
Women's shoe stores	4,934	$1,277.3	5,077	$ 944.6
Total, all merchandise	100.0%	100.0%	100.0%	100.0%
Footwear	100.0	92.1	100.0	88.7
Women's & girls' clothing & access.	53.2	7.5	51.6	7.7
Handbags & small leather goods	49.9	5.1	48.9	5.1
Hosiery	33.7	1.3	30.7	1.2
Other merchandise & receipts	--	0.4	--	3.6
Men's & boys' shoe stores	3,306	$ 669.4	2,583	443.4
Total, all merchandise	100.0%	100.0%	100.0%	100.0%
Footwear	100.0	97.6	100.0	93.9
Men's & boys' clothing & access.	20.7	2.0	26.5	1.8
Hosiery, underwear, etc.	15.6	0.6	nr	nr
Women's & girls' clothing & access.	3.7	0.2	1.1	0.2
Handbags & small leather goods	1.5	0.1	nr	nr
Other merchandise & receipts	--	0.2	--	4.1

(continued)

Shoe Stores

Shoe Store Sales: Total & Major Merchandise Classifications
(continued)

	1977		1972	
	Stores*	Sales**	Stores*	Sales**
Children's shoe stores	901	142.0	803	$ 102.9
Total, all merchandise	100.0%	100.0%	100.0%	100.0%
Footwear	100.0	95.9	100.0	94.1
Women's & girls' clothing & access.	20.1	3.9	13.4	3.4
Infants' & toddlers' clothing	18.1	3.4	11.0	0.1
Other merchandise & receipts	--	0.2	--	2.5

nr = not reported

* Percentages in this column represent the number of stores reporting sales of the specified merchandise.

** Percentages in this column represent the percent of total sales of this store type represented by specified merchandise, including in the base stores which do not sell all types of merchandise listed.

Source: Fairchild Research Department based on U.S. Bureau of the Census, Census of Retail Trade, 1972, 1977.

Total sales of shoe stores in the U.S. in 1980 registered a gain of 8.4% compared with 1979; and in the first quarter of 1981 sales were up 7.8%. The share of shoe store sales of chains (11 or more stores) held at 46.1% in 1980 and 1979, down from 48.1% in 1978, according to Census Bureau revised data.

Shoe Store Sales, 1978-1980
(Millions of Dollars)

	1980	1979(r)	1978(r)	% Change 1980/79	% Change 1979/78
Shoe store sales, total	$8,040	$7,418	$6,501	+ 8.4	+14.1
Chains (11 or more stores)	3,707	3,420	3,129	+ 8.4	+ 9.3
Chain store sales, % of total shoe store sales	46.1%	46.1%	48.1%	--	--

(r) = revised

Source: U.S. Bureau of the Census, Revised Monthly Retail Sales and Inventories: Current Business Reports (BR-13-80S).

RETAIL TRADE

Shoe Stores

Seasonal Patterns in Shoe Store Sales, 1977-1980
Percent of Year's Sales by Month

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1980	7.0	6.0	7.8	8.7	8.2	7.5	7.2	9.0	8.6	9.0	9.3	11.7	100.0%
1979(r)	6.5	5.5	7.9	8.7	7.9	7.7	7.2	9.1	8.9	9.3	9.3	12.0	100.0
1978(r)	6.3	5.6	8.5	7.9	8.0	7.8	7.1	8.7	9.1	8.8	9.4	12.7	100.0
1977	6.3	5.9	7.4	8.9	7.5	7.4	7.5	8.8	9.1	9.1	9.5	12.6	100.0

Dates of Easter: 1981 - April 19; 1980-April 6; 1979-April 15; 1978-March 26; 1977-April 10.

(r) = revised.

Source: Based on U.S. Bureau of the Census,
Monthly Retail Sales & Inventories
(BR-13-80S).

Shoe Stores: Selected Operating Ratios - 1978, 1979
(Median Figures)

Year	Number of Companies Reporting	Current Assets to Current Debt (times)	Net Profits on Net Sales	Net Profits on Net Working Capital	Net Sales to Inventory (times)
1979	2,987	3.04	5.54%	22.98%	3.3
1978	2,866	3.01	5.16	21.52	3.3(r)

(r) = revised

Source: Dun & Bradstreet, Inc.,
Business Economics Div.

Department Stores

Total Department Store Sales, 1978 - 1980
(Millions of Dollars)

1980	1979	1978(r)	% Change 1980/79	% Change 1979/78
$94,185	$88,520	$81,494	+ 6.4%	+ 8.9%

Source: U.S. Bureau of the Census,
Current Business Reports
(BR-13-80S).

In the typical department store which had a total volume of $1 million or more, footwear departments (upstairs store) contributed 3.7% of total store sales in 1979, according to the National Retail Merchants Association. Among stores reporting on women's and misses' shoe departments (upstairs), this department accounted for a median 2.4% of total sales.

(continued)

Department Stores

Compared with 1978, footwear sales in the typical department store gained 6.8%. Junior and teen shoes fared best, with a median increase of 9.2% among reporting stores. Children's shoe departments, on the other hand, showed a median loss of 3.1%.

Department Store Footwear Departments: Selected Operating Ratios, 1979
(Total Store Sales Over $1 Million)
(Median Results)

	Upstairs Store-Total All Shoes (49*)	Total Womens', Misses', Junior Shoes (29*)	Womens' & Misses' Dress & Casual Shoes (33*)	Junior & Teen Shoes (25*)	Men's Footwear (43*)	Children's Footwear (34*)	Budget Dept. Shoes, Total (29*)
Cumulative markon, %	50.8%	51.4%	51.3%	51.3%	49.0%	49.7%	50.2%
Net sales, % of change from 1977	6.8	9.4	7.7	9.2	4.4	3.1	5.8
Markdowns, % of net sales	15.8	16.2	17.9	19.1	12.3	10.6	13.3
Gross margin, % of net sales	44.5	44.2	45.0	44.7	44.6	46.6	44.6
Net sales, % of total store	3.7	3.2	2.3	0.7	0.6	0.3	2.4
Returns, % of gross sales	10.3	5.9	nr	nr	7.6	6.6	8.4
Sales promotion costs (net) % of sales	2.4	2.3	nr	nr	2.7	3.1	2.2
$ sales per sq. ft. of selling space	$121.0	$116.0	$127.9	nr	$127.9	$ 42.5	$ 99.1
Stock turns (times)	2.1	2.2	2.3	2.4	1.6	1.7	2.2

Source: National Retail Merchants Association, Merchandising & Operating Results, 1980 Edition.

Apparel Specialty Stores

The typical women's wear and family apparel store registered a gain of less than 2% in footwear sales in 1979 compared with 1978, according to the National Retail Merchants Association. In men's wear stores, according to the Menswear Retailers of America, footwear sales showed a typical gain of 10.1% in stores handling men's/boys' wear only, and a rise of 4.9% in men's wear stores which also sell women's wear.

Apparel Specialty Stores

Women's Specialty Stores & Family Clothing Stores: Selected Operating Ratios For Footwear Departments, 1979

(Total Store Volume Over $1 Million)
(Median Results)

Footwear departments (13*)	
Cumulative markon, %	52.7
Net sales, % of change from 1978	+ 1.8
Net sales, % of total store	4.8
Markdowns, % of net sales	20.0
Gross margin, % of net sales	43.0
Stock turns (times)	1.7

*The number of reporting companies in each category.

Source: National Retail Merchants Association, Merchandising & Operating Results, 1980 Edition.

Men's Wear Stores: Selected Operating Ratios for Men's & Boys' Shoe Departments, 1980

(Median Results)

	% of Total Store Sales	% Change in Sales 1980/79	Markdowns % of Men's Shoe Sales	Stock Turns Per Year (times)
Men's & boys' shoes:				
In men's wear stores handling men's wear only	6.5% (42)	+0.7% (36)	9.9% (27)	1.2 (21)
In men's wear stores which also sell women's wear	4.5 (41)	+0.3 (37)	12.6% (34)	1.4 (22)

Note: Figures in parentheses cover the number of reporting firms in each ratio.

Source: Menswear Retailers of America, Annual Business Survey, June 1981.

BUYING HABITS

In November 1980 a second study on footwear buying practices was conducted for Footwear News Magazine, to supplement the information developed in the 1979 study. Telephone interviews were again conducted for the publication by the Valley Forge Information Service, King of Prussia, Pa., among respondents selected in a national probability sample. Interviews were completed among 505 men and 604 women covering their footwear buying practices, and among 225 mothers of children under 13 years of age.

(continued)

BUYING HABITS

The major characteristics of respondents were as follows:

	Men (505)	Women (604)
Total	100.0%	100.0%
Age: 18-24	20.8	14.6
25-34	31.5	26.8
35-49	22.0	24.8
50 & over	25.3	32.6
No answer	0.4	1.2
Household income:		
Under $25,000	47.5	48.8
$25,000 - $34,999	25.9	26.8
$35,000 & over	18.0	12.4
No answer	8.6	11.9
Employment status:		
Working	76.0	53.3
Not working	24.0	46.7
Region of the U.S.:		
Northeast	24.4	23.5
North Central	27.7	28.0
South	32.1	32.3
West	15.8	16.2

Findings in the Footwear News Magazine surveys are covered in a series of reports appearing in each issue of the monthly publication. The following tables supplement information based on the November 1980 survey which have been published by Footwear News Magazine in the January through August 1981 issues.

Children's Shoes

A total of 225 interviews were conducted by telephone among mothers of children under 13 years of age throughout the country in November 1980. Responses covered 96 boys under 6 years of age and 103, ages 6 to 12; 88 girls under 6 and 107, ages 6 to 12, for a total of 394 children under 13 years of age.

Percent of Mothers Reporting That Their Children Influence Their Selection of Shoes

	Boys		Girls	
	Under 6	6 - 12 Yrs.	Under 6	6 - 12 Yrs.
Total mothers	34.1%	78.8%	26.3%	71.1%
Age of mother:				
18 to 24	33.3	100.0	26.7	33.3
25 to 34	27.9	73.9	18.4	72.1
Over 34	66.7	83.8	54.5	72.9
Employed	37.5	80.0	34.1	76.9
Not employed	21.1	77.5	17.1	65.9

(continued)

Children's Shoes (continued)

As noted above, boys under 13 years of age (particularly those under 6) have a greater "say" in the selection of their shoes than do girls. Mothers who are employed are apparently influenced by their children to a greater extent than those who are not working. In any case, after age 6, children play a large role in the selection of their shoes.

Chief Concerns of Children Who Influence Shoe Selections
(Percent of Mothers Reporting)

	Boys		Girls	
	Under 6	6 - 12 Yrs.	Under 6	6 - 12 yrs.
Chief concerns:				
Style	62.1%	77.6%	70.0%	88.1%
Color	55.2	31.3	25.0	32.2
Brand	24.1	19.4	15.0	11.9
Fit/comfort	3.4	1.5	10.0	-0-

Mothers are more likely to be loyal to a specific brand of shoe for their sons 6 to 12 years of age, and for younger boys, than for girls. Better than four out of 10 (43.5%) mothers said they usually get a specific brand in buying shoes for boys 6 to 12, a third usually buy a specific brand for younger boys. Comparable percentages for daughters were 28.9% and 29.3%, respectively.

While children exert most of their influence in regard to style selections in buying shoes for themselves, service from stores in fitting shoes, followed by price, are most frequently listed as important considerations by mothers in buying children's shoes. Help in fitting is particularly important to mothers in buying shoes for boys under six. The next most frequent references to the importance of this service was mentioned by mothers with daughters in the 6-to-12 age group. Shoes made of leather seem to be more important to mothers of older children (6-to-12) than younger children, and in shoes for girls rather than boys.

Considerations of Importance To Mothers In Buying Shoes
(Percent of Mothers Specifying Each Consideration)

	For Boys		For Girls	
	Under 6	6 to 12	Under 6	6 to 12
Service from store in fitting shoes	60.7%	44.7%	45.3%	49.4%
Price	47.6	49.4	36.0	53.0
Style	35.7	28.2	26.7	42.2
Shoes made of leather	27.4	34.1	29.3	42.2
Brand	35.7	28.2	25.3	28.9
Shoes made in the U.S.	17.9	18.8	20.0	24.1
Comfort/fit	3.6	3.5	9.3	3.6
Durability/quality	3.6	3.5	4.0	2.4
Total respondents on each sex/age group*	100.0%	100.0%	100.0%	100.0%

*Columns add to more than 100.0% due to multiple answers.

Children's Shoes (continued)

Mothers surveyed by Valley Forge Information Service were asked about the average price they paid for their children's shoes. In dress shoes for both boys and for girls the largest percentage of responses fell in the $15 to $24 range, accounting for over 40 percent in all cases. In buying casual shoes for children under 6 years of age, most mothers looked for shoes under $15. For children in the 6-to-12 group, the percentage of mothers who usually paid $15 to $24 exceeded the percentage paying under $15. Most mothers of boys and girls under 6 usually pay under $15 for their athletic footwear; for older children the percentage paying this amount and those paying from $15 to $24 was closer.

The number of mothers surveyed who were in households with an income of under $25,000 and those with household incomes of $25,000 and up were about equal. As expected, differences in the patterns in average price paid for children's shoes were noted among mothers in the two income groups.

Average Price Paid For Children's Shoes By Mothers Based On Household Income
(Percent of Mothers of Children In Each Age/Sex Group)

Type of Shoe & Average Price Paid	For Boys By Age				For Girls By Age			
	Under 6		6 to 12		Under 6		6 to 12	
Household income (thous.)	Under $25	$25+	Under $25	$25+	Under $25	$25+	Under $25	$25+
Dress shoes	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under $15	38.9	27.5	21.2	9.1	54.3	17.1	38.2	15.9
$15 to $24	36.1	47.5	42.4	40.9	28.6	54.3	47.1	45.5
$25+	16.7	17.5	27.3	43.2	11.4	22.9	11.8	34.1
No answer/don't buy	8.3	7.5	9.1	6.8	5.7	5.7	2.9	4.5
Casual shoes	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Under $15	61.1	57.5	48.5	20.4	65.7	37.1	55.9	25.0
$15 to $24	16.7	25.0	24.2	45.5	20.0	37.1	29.4	54.5
$25+	5.6	10.0	15.2	31.8	8.6	11.5	11.8	18.2
No answer/don't buy	16.7	7.5	12.1	2.3	5.7	14.3	2.9	2.3
Athletic shoes	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Under $15	63.9	57.5	57.6	20.4	68.6	48.6	70.6	20.5
$15 to $24	8.3	25.0	24.2	43.2	8.6	22.9	14.7	50.0
$25+	--	10.0	6.1	31.8	2.9	2.8	2.9	20.4
No answer/don't buy	27.8	7.5	12.2	4.6	20.0	25.7	11.7	9.1
No. of mothers reporting	36	40	33	44	35	35	34	44

In buying all types of shoes for children under 6 years of age, particularly casual and athletic shoes, most mothers in households with incomes under $25,000 paid an average of $15 or less per pair. In buying dress shoes for boys, while the biggest percentage of mothers in this income bracket usually paid under $15 per pair (38.9%), a close percentage (36.1%) paid an average of from $15 to $24. Lower income mothers of daughters under six seemed more inclined to pay less than $15 per pair for dress shoes than noted for boys. Over half (54.3%) of responses were in this category as compared with 38.9% for boys.

(continued)

Children's Shoes (continued)

The pattern of responses in regard to average price paid for shoes for children under 6 by mothers with incomes of $25,000 or more varied considerably for boys compared with girls. In dress shoes, most mothers paid an average of $15 to $24 for boys as well as for girls, but the percentage in this category was higher for girls—54.3% vs. 47.5%. Close to 23% of upper income mothers of girls under 6 paid an average of $25 or more for their daughters' dress shoes, while the comparable figure for mothers of boys was 17.5%.

Mothers in the $25,000 and up income bracket were evenly divided (at 37.1% each) in usually paying under $15 and from $15 to $24 for casual shoes for girls under 6, but well over half (57.5%) of the mothers of boys under 6 in that income group usually paid under $15 for their casual shoes.

For children from 6 to 12 years of age mothers in both income groups usually paid $15 to $24 for dress shoes, except for upper income mothers of boys, a higher percentage of whom reported paying $25 or more (43.2% vs. 40.9%). The price group of $15 to $24 was favored for casual and athletic shoes by mothers in the $25,000 and over bracket.

A bigger percentage were in the habit of paying $25 or more for athletic shoes for boys 6 to 12 years of age than for girls (31.8% vs. 20.4%).

BUYING HABITS—MEN

The survey conducted for Footwear News Magazine by Valley Forge Information Service in late fall, 1980, looked into the characteristics of 1980 shoe customers, their buying habits and plans in regard to filling footwear requirements in 1981. Findings based on interviews by telephone with 505 adult males, selected in a nationwide probability sample, are summarized in the following tables.

Characteristics of Male Customers Who Bought Shoes in 1980 & Plan To Buy Them in 1981

	Percent of Respondents*					
	Men Who Purchased in 1980		1980 Male Customers Who Plan To Buy Shoes in 1981			
	Casual Shoes	Dress Shoes	Casual Shoes		Dress Shoes	
			Percent	Av.# of Prs.	Percent	Av.# of Prs.
Total	49.3%	45.9%	90.0%	1.76%	84.1	1.66
Age:						
18 to 24	54.3	49.5	91.2	1.82	84.6	1.58
25 to 34	59.1	43.4	90.4	1.98	79.7	1.97
35 to 49	49.5	52.3	90.9	1.69	93.1	1.71
50 to 64	32.2	39.1	85.7	1.29	79.4	1.35
65 years & older	34.1	43.9	85.7	1.36	83.3	1.28
Household income: (thous.)						
Under $25	42.9	37.9	91.3	1.65	84.6	1.53
$25 to $34.9	53.4	50.4	95.7	1.73	87.9	1.68
$35 to $49.9	65.5	56.9	81.6	1.66	75.8	1.58
$50 & over	54.5	72.7	94.4	2.61	91.7	2.21
Region:						
Northeast	52.8	48.0	87.7	1.77	83.1	1.61
North Central	41.4	42.1	89.7	1.48	84.7	1.49
South	54.9	46.9	89.9	1.93	89.5	1.96
West	46.2	47.5	94.6	1.78	73.7	1.42
Fashion forerunners (men generally concerned with having the newest fashion look)	57.8	57.8	94.6	2.08	91.9	2.19

*The base, equal to 100.0%, for each percentage is the total number of males in each age group, each income group, each region, etc.

Data on plans to purchase reads (for example): Of male respondents 18 to 24 years of age who purchased one or more pairs of casual shoes in 1980, 91.2% plan to buy casual shoes again in 1981. The number of pairs to be purchased among this age group averaged 1.82.

Expectations on Price Trends

Most men interviewed toward the end of last year anticipated somewhat higher prices for shoes on their next shoe-buying trip than last year. Variations in the extent of price increases expected were noted in terms of demographics. For example, men in the Northeast were bracing for much higher prices to a greater extent than noted in other regions.

If faced with higher prices when next shopping for shoes, a greater percentage of men expect to go ahead and buy the shoes needed at the higher price than noted among women (37.2% vs. 24.8%), but almost the same percentage (38%) of the men said they would wait for sales.

Outlook on Shoe Prices & Expected Reaction To Higher Prices
(% of Male Respondents)

	Expect prices will be--				Expected Reaction To Higher Prices			
	Much Higher	Somewhat Higher	About Same	Lower	Would Buy Fewer Prs.	No Affect	Would Trade Down	Wait For Sale
All respondents*	28.5%	55.4%	14.3%	1.6%	15.1%	37.2%	9.1%	38.0%
Age:								
18 to 24	27.6	57.1	14.3	1.0	14.3	37.1	11.4	37.1
25 to 34	19.5	61.0	18.2	1.3	13.8	37.1	7.5	41.5
35 to 49	34.2	51.4	11.7	2.7	11.7	36.9	9.0	42.3
50 to 64	32.2	52.9	11.5	2.3	23.0	35.6	10.3	28.7
65 & over	43.9	43.9	12.2	--	14.6	39.0	7.3	36.6
Household income: (thous.)								
Under $25	31.7	52.9	13.7	1.2	15.0	31.3	10.0	42.5
$25 to $34.9	23.7	62.6	13.7	--	16.8	36.6	7.6	38.9
$35 to $49.9	25.9	60.3	12.1	1.7	13.8	51.7	5.2	29.3
$50 & over	18.2	60.6	15.2	6.1	6.1	63.6	6.1	24.2

*Base covers 505 male respondents in the survey. Where percentages do not add across to 100.0% the balance covers no answers.

Prices Paid—1981/1980

For younger men, the most popular price bracket for casual shoes was $20 to $34 in 1981. Among men 35 to 64 years of age, the biggest percentage plan to pay from $35 to $49 for their casual shoes this year. Most men expect to pay more for their casual shoes in 1981 than 1980, regardless of age or income.

In buying dress shoes in 1981, over a third of male respondents expected to pay from $35 to $49 per pair; the second largest group (29.7%) expected to pay from $50 to $74.

BUYING HABITS—MEN

Prices — 1981/1980 (continued)

Price To Be Paid By Men For Shoes in 1981 & How This Compares With Price Paid in 1980
(% of Respondents)

	Price To Be Paid in 1981					1981 Price Compared To Price Paid in 1980			
	Under $20	$20-$34	$35-$49	$50-$74	$75+	More	Less	Same	Don't Know
For casual shoes:									
All respondents*	10.3%	51.3%	29.0%	7.1%	2.2%	46.9%	17.4%	34.4%	1.3%
Age:									
18 to 24	--	73.1	23.1	1.9	1.9	36.5	26.9	34.6	1.2
25 to 34	14.1	56.5	21.2	7.1	1.2	45.9	15.3	37.6	1.2
35 to 49	14.0	32.0	36.0	12.0	6.0	60.0	16.0	22.0	2.0
50 to 64	16.7	29.2	50.0	4.2	--	41.7	8.3	50.0	--
65 & over	--	41.7	41.7	16.7	--	50.0	16.7	33.3	--
Household income:	(thous.)								
Under $25	13.8	54.3	21.3	9.6	1.1	44.7	10.6	42.6	2.1
$25 to $34.9	6.0	55.2	31.3	6.0	1.5	44.8	22.4	31.3	1.5
$35 to $49.9	16.1	32.3	41.9	3.2	6.5	58.1	19.4	22.6	--
$50 & over	--	47.1	41.2	5.9	5.9	41.2	23.5	35.3	--
Region:									
Northeast	10.5	47.4	31.6	8.8	1.8	35.1	22.8	40.4	1.8
North Central	15.4	48.1	32.7	1.9	1.9	51.9	13.5	32.7	1.9
South	6.3	50.0	31.3	8.7	3.7	52.5	17.5	28.7	1.2
West	11.4	65.7	14.3	8.6	--	45.7	14.3	40.0	--
For dress shoes:									
All respondents*	2.1	21.5	34.4	29.7	11.8	54.5	15.4	29.2	1.0
Age:									
18 to 24	--	29.5	38.6	25.0	4.5	65.9	18.2	13.6	2.3
25 to 34	1.8	16.4	34.5	34.5	12.7	50.9	18.2	29.1	1.8
35 to 49	--	18.5	29.6	27.8	24.1	46.3	14.8	38.9	--
50 to 64	11.1	14.8	33.3	37.0	3.7	63.0	3.7	33.0	--
65 & over	--	29.5	38.6	25.0	4.5	46.7	20.0	33.3	--
Household income:	(thous.)								
Under $25	5.2	22.1	44.2	22.1	5.2	54.5	18.2	26.0	1.3
$25 to $34.9	--	20.7	34.5	36.2	8.6	55.2	15.5	27.6	1.7
$35 to $49.9	--	16.0	24.0	44.0	16.0	54.5	18.2	26.0	1.3
$50 & over	--	13.6	18.2	27.3	40.9	50.0	13.6	36.4	--
Region:									
Northeast	2.0	18.4	30.6	42.9	6.1	53.1	18.4	28.6	--
North Central	2.0	22.0	36.0	24.0	14.0	58.0	16.0	24.0	2.0
South	1.5	20.6	42.6	20.6	14.7	52.5	17.5	28.7	1.2
West	3.6	28.6	17.9	39.3	10.7	45.7	14.3	40.0	--

*Bases cover 224 men who bought casual shoes in 1980 and expect to buy them again in 1981, and 195 men who bought dress shoes in 1980 and expect to buy them in 1981. (Where columns on "Price Paid" do not add to 100.0%, the balance is due to "no answer.")

BUYING HABITS—MEN

Athletic Footwear

Among the 505 men 18 years and older selected in a nationwide sample of adults, who were interviewed for Footwear News Magazine, over half (55.2%) had purchased footwear for a specific sport.

Significant variations in the level of interest were noted on a regional basis. The West claimed the biggest percentage of active sports footwear (70.3%); the South, the smallest (49.4%).

Concern with image is a factor in the purchase of footwear for active sports among men, and among male survey respondents who described themselves as wanting the newest fashion look, over 70% had purchased footwear designed for a specific sport.

When purchasers were asked where they usually buy athletic footwear, men named a variety of outlets. Overall, specialty athletic footwear stores were mentioned most frequently, and were particularly popular among younger men (under 35). General-line sporting goods stores ranked second in number of mentions, specialty line, third, with a variation in the pattern based on age and income.

Purchase Patterns For Athletic Footwear By Age & Income
(% of Male Respondents)

		Age				Household Income (thous.)		
	Total	18-24	25-34	35-49	50+	Under $25	$25-$34.9	$35+
Purchasers of athletic footwear	55.2%	75.2%	66.0%	50.5%	30.5%	45.4%	64.1%	71.4%
Usual place of purchase of athletic footwear:								
Total male purchasers	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Specialty athletic footwear store	21.5	27.8	24.8	16.1	7.7	19.3	23.8	24.6
Sporting goods store								
General-line	19.4	17.7	21.9	16.1	20.5	16.5	14.3	26.2
Specialty-line	16.8	22.8	13.3	10.7	23.1	12.8	16.7	18.5
Department store	16.1	12.7	14.3	26.8	12.8	17.4	19.0	10.8
Shoe store-conventional	15.1	10.1	14.3	19.6	20.5	17.4	17.9	10.8
Shoe store-discount	7.5	6.3	8.6	8.9	5.1	11.9	6.0	4.6
Other (PX/Base Exch., mail order, etc.)	3.6	2.6	2.8	1.8	10.3	4.6	2.3	4.5

Of those men in the survey who were identified as active sports-minded, and had at sometime purchased functional athletic footwear, 80% had bought one or more pairs in 1980. However, looking ahead to 1981, only 69% had plans to buy athletic footwear. The 1980 purchasers who bought more than one pair accounted for 40%, but only a third of those planning to buy athletic shoes in 1981 expected to buy more than one pair.

The percentage of men interested in athletic shoes was highest among the 18-to-24 age group.

Athletic Footwear (continued)

Percent of Men Who Had Ever Bought Athletic Footwear Who Purchased in 1980 & Percent Who Expect To Buy Athletic Footwear in 1981

		Age				Household Income (thous.)		
	Total	18-24	25-34	35-49	50+	Under $25	$25-$34.9	$35+
Men who ever purchased athletic footwear:	100.0%	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Bought 1 or more pair in 1980	79.9	92.4	80.0	80.4	53.8	78.0	84.5	75.4
Expect to buy in 1981	68.8	86.1	70.5	62.5	38.5	72.5	69.0	64.6

Attitudes Toward Imports

The survey among a sample of 505 adult men throughout the country, conducted for Footwear News Magazine, developed information in regard to imported shoes in general, and attitudes in regard to specific countries, as noted below.

	% Who Ever Look At Labels To See Country Where Shoes Were Made	% Who Will Not Buy Shoes From Specific Countries	Countries Most Frequently Mentioned (In order of no. of mentions)
Total respondents	61.2%	20.2%	
Age:			
18 - 24	58.1	15.2	Japan, Taiwan, "Any"** (68.2%)
25 - 34	57.2	18.9	Japan, "Any," Taiwan, Korea, Mexico (47.1%)
35 - 49	69.4	21.6	"Any," Japan, Korea, Russia (71.4%)
50 - 64	63.2	26.4	"Any," Japan (48.2%)
65+	58.5	22.0	Taiwan, Russia, Japan (48.2%)
Household income:			
Under $35,000	63.6	20.7	"Any," Japan, Taiwan (51.1%)
$35,000+	51.6	23.1	"Any," Japan, Taiwan (52.0%)
Regions:			
Northeast	62.6	21.1	
North Central	60.7	18.6	
South	60.5	19.8	
West	61.2	22.5	
Fashion forerunner	60.9	10.9	

*Percentages represent the share of total mentions of all countries represented by the listed countries.

**Covers response "any country outside of the U.S."

About 44% of the men surveyed said that 11 of the dress or casual shoes purchased in 1980 were domestic manufactures, 21% said most of them were; 17%, less than half; 8.3% said all of them were imports. The remainder did not buy shoes last year, or did not know the country of origin.

(continued)

Attitudes Toward Imports (continued)

Concentration of responses indicating that all shoes were U.S.-made increased with advancing age, ranging from a third of men 18 to 24 years of age to over 60% of those over 50. Eclectic men, interested in keeping up with fashion and styles, are the least likely to confine their purchases to made-in-the-U.S. footwear.

Usual Place-of-Purchase

Regular-price shoe stores top the list of retail outlet types favored by adult male customers in buying either dress shoes or casual shoes, according to the Footwear News Magazine survey, with department stores in second place in terms of number of mentions on the usual place of purchase for these shoes. There were variations in the pattern, based on age, income and other factors.

Over half of the male respondents in the Northeast and North Central region of the country said they usually buy their dress and casual shoes in regular-price shoe stores, but the percentages were smaller in the South and in the West—department stores picking up the slack in these regions.

Store Types Where Casual & Dress Shoes Are Usually Bought
(% of Respondents)

		Age Group					Income (thous.)			
	Total	18-24	25-34	35-49	50-64	65+	Under $25	$25-$34.9	$35-$49.9	$50 & Over
Men's casual shoes										
Total respondents	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Reg.-price shoe store	43.8	50.5	37.7	38.7	48.3	53.7	40.4	45.0	46.6	60.6
Department store	22.6	23.8	24.5	21.6	20.7	19.5	26.2	21.4	13.8	18.2
Mass merchandiser	9.5	5.7	6.9	15.3	8.0	17.1	9.6	10.7	12.1	3.0
Discount shoe store	8.7	4.8	13.8	7.2	8.0	2.4	11.2	8.4	3.4	6.1
Apparel store	6.3	6.7	7.5	9.0	3.4	--	3.7	8.4	13.8	6.1
Discount store	2.2	1.9	3.8	1.8	1.1	--	2.5	1.5	5.2	--
Other outlets*	6.0	5.7	5.1	5.4	9.2	4.9	5.5	4.6	5.2	3.0
Men's dress shoes										
Total respondents	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Reg.-price shoe store	50.5	56.4	45.9	44.1	56.3	58.5	47.5	50.4	46.6	69.7
Department store	20.0	23.8	20.1	18.9	18.4	17.1	22.9	19.1	15.5	12.1
Mass merchandiser	8.5	4.8	6.9	14.4	5.7	14.6	9.2	9.2	10.3	3.0
Apparel store	6.5	5.7	10.1	7.2	3.4	--	2.9	10.7	13.8	6.1
Discount store	2.2	1.9	3.8	0.9	1.1	--	2.1	2.3	3.4	--
Other outlets*	4.8	1.9	2.6	6.3	10.3	4.9	5.9	2.3	8.6	3.0

Store Selection

In selecting a store in which to buy shoes, men interviewed in the Footwear News Magazine survey generally rated price the first consideration. Fashion or style ranked next, followed by convenience of the store location, then by sales help.

(continued)

BUYING HABITS—MEN

Store Selection (continued)

There were variations in the pattern when responses were analyzed by demographic characteristics. Younger men (under 35) put more emphasis on price as a factor in store selection than did older men and, as expected, price is more important to men with incomes under $25,000 than to the more affluent, who are more likely to consider fashion and style before price, as do men who are described as fashion forerunners.

The number of stores men shopped in before making a final selection of shoes averaged 3.11. It was higher among younger shoppers, averaging 3.72 stores among men 18 to 24, and reached a low of 2.64 stores among men 50 to 64 years of age. On a regional basis, shoppers are most active in the West, where the number of stores shopped by male shoe customers averaged 3.38.

BUYING HABITS—WOMEN

The survey conducted for Footwear News Magazine by Valley Forge Information Service in late fall, 1980, included interviews by telephone with 604 adult females, selected in a nationwide probability sample. Findings are summarized in the following tables.

Characteristics of Female Customers Who Bought Shoes in 1980 & Plan To Buy Them in 1981

	Percent of Respondents*					
	Women Who Purchased in 1980		1980 Female Customers Who Plan To Buy in 1981			
	Casual Shoes	Dress Shoes	Casual Shoes		Dress Shoes	
			Percent	Av.# of Prs.	Percent	Av.# of Prs.
All respondents	66.1%	57.9%	92.5%	2.35	88.8	2.12
Age:						
18 to 24	64.8	65.9	91.2	2.65	89.7	2.07
25 to 34	72.8	63.0	97.5	2.72	90.2	2.70
35 to 49	69.3	60.7	94.2	2.22	92.3	1.98
50 to 64	61.8	49.3	90.2	2.08	86.6	1.84
65 & over	54.1	47.5	78.8	1.56	75.9	1.25
Household Income:	(thous.)					
Under $25	59.7	50.2	88.6	1.98	85.8	1.73
$25 - $34.9	75.3	69.1	95.9	2.64	85.7	2.14
$35 - $49.9	76.8	67.9	97.7	2.67	97.4	2.68
$50 & over	73.7	73.7	100.0	3.86	100.0	3.21
Region:						
Northeast	63.5	55.6	90.3	1.99	83.5	1.78
North Central	61.5	56.2	93.2	2.28	89.5	2.17
South	66.7	61.0	91.5	2.50	88.4	2.44
West	73.5	58.2	95.8	2.63	87.7	1.86
Fashion forerunners (women generally concerned with having the newest fashion look)	74.8	71.3	94.2	3.23	93.9	2.78

*The base, equal to 100.0%, for each percentage is the total number of females in each age group, each income group, each region, etc. (adding across).

Data on plans to purchase reads (for example): Of female respondents 18 to 24 years of age who purchased one or more pairs of casual shoes in 1980, 91.2% plan to buy casual shoes in 1981. The number of pairs to be purchased among this age group averaged 2.65.

BUYING HABITS—WOMEN

Expectations on Price Trends

When next shopping for shoes, over half the women interviewed expected somewhat higher prices but a substantial 31.5% were bracing for much higher prices compared with a year ago.

If faced with higher prices over half (51.3%) of the women said they would wait for sales; 24.8% said higher prices would not affect their buying plans at all and they would buy shoes needed at the higher prices. This was particularly true among women 18 to 24 years of age, and those in households with incomes upwards of $25,000.

Outlook on Shoe Prices & Expected Reaction To Higher Prices
(% of Female Respondents)

	Expect prices will be--				Expected Reaction To Higher Prices			
	Much Higher	Somewhat Higher	About Same	Lower	Would Buy Fewer Prs.	No Affect	Would Trade Down	Wait For Sale
All respondents*	31.5%	55.0%	12.4%	0.8%	16.6%	24.8%	6.6%	51.3%
Age:								
18 to 24	18.2	61.4	19.3	1.1	15.9	29.5	6.8	46.6
25 to 34	30.2	56.8	11.7	--	13.6	25.3	8.6	52.5
35 to 49	24.7	72.7	12.0	0.7	18.0	26.0	6.0	50.0
50 to 64	41.2	45.6	11.8	1.5	17.6	20.6	5.9	55.1
65 & over	45.9	44.3	8.2	1.6	19.7	21.3	4.9	52.5
Household income: (thous.)								
Under $25	39.7	46.8	12.2	1.0	13.9	19.0	6.4	60.0
$25 to $34.9	22.2	64.8	11.7	0.6	14.2	33.3	6.8	45.1
$35 to $49.9	16.1	69.6	12.5	1.8	26.8	28.6	7.1	37.5
$50 & over	21.1	57.9	21.1	--	52.6	26.3	10.5	10.5

*Base covers 604 female respondents in the survey. Where percentages do not add across to 100.0% the balance covers no answers.

Prices—1981/1980

Among women who bought casual shoes last year and plan to buy casual shoes again this year, 48% expect to pay more than in 1980, 34% will pay about the same price, 17% expect to pay less. For dress shoes, comparable percentages were 45%, 39% and 16%, respectively.

Prices—1981/1980

Price To Be Paid By Women For Shoes in 1981 & How This Compares With Price Paid in 1980

(% of Respondents)

	Price Paid in 1980					Expect To Pay in 1981			
	Under $20	$20-$34	$35-$49	$50-$74	$75+	More	Less	Same	Don't Know
For casual shoes:									
All respondents*	22.4%	60.1%	14.3%	2.2%	0.5%	48.0%	17.0%	34.0%	1.1%
Age:									
18 to 24	21.2	63.5	13.5	1.9	--	42.3	19.2	38.5	--
25 to 34	22.4	62.1	12.9	1.7	0.9	52.6	18.1	29.3	--
35 to 49	23.5	59.2	13.3	3.1	--	44.9	15.3	38.8	1.0
50 to 64	26.3	55.3	15.8	1.3	--	40.8	13.2	42.1	3.9
65 & over	11.1	59.3	22.2	3.7	3.7	70.4	22.2	7.4	--
Household income: (thous.)									
Under $25	30.6	55.4	12.7	0.6	--	49.0	14.0	35.7	1.3
$25 to $34.9	17.8	65.3	13.6	1.7	1.7	44.1	20.3	33.9	1.7
$35 to $49.9	16.7	61.9	14.3	7.1	--	54.8	14.3	31.0	--
$50 & over	7.1	57.1	35.7	--	--	42.9	14.3	42.9	--
Region:									
Northeast	19.0	58.3	19.0	--	2.4	46.4	15.5	36.9	1.2
North Central	30.6	58.2	9.2	1.0	--	44.9	16.3	37.8	1.0
South	21.7	64.2	10.8	3.3	--	53.3	20.0	25.0	1.7
West	15.9	58.0	21.7	4.3	--	44.9	14.5	40.6	--
For dress shoes:									
All respondents*	6.1	49.5	27.2	13.4	3.5	45.0	15.7	39.0	0.3
Age:									
18 to 24	5.8	61.5	19.2	11.5	1.9	32.7	32.7	34.6	--
25 to 34	4.3	47.3	28.0	14.0	5.4	47.3	14.0	38.7	--
35 to 49	7.1	47.6	28.6	14.3	2.4	45.2	15.5	39.3	--
50 to 64	8.6	50.0	24.1	13.8	1.7	46.6	8.6	43.1	1.7
65 & over	--	34.8	47.8	8.7	8.7	60.9	4.3	34.8	--
Household income: (thous.)									
Under $25	8.6	55.5	21.9	12.5	1.6	44.5	14.8	39.8	0.8
$25 to $34.9	4.1	50.5	34.0	6.2	5.2	43.3	17.5	39.2	--
$35 to $49.9	8.1	40.5	24.3	21.6	5.4	48.6	10.8	40.5	--
$50 & over	--	21.4	50.0	21.4	7.1	42.9	21.4	35.7	--

*Bases cover 371 women who bought casual shoes in 1980 and expect to buy them in 1981, and 313 women who bought dress shoes and plan to buy them in 1981.

Athletic Footwear

Among the 604 women age 18 and over selected in the nationwide sample of adults, who were interviewed for Footwear News Magazine, 38.7% said they had purchased athletic footwear designed for a specific sport. The highest percentage of purchasers (over half) was noted among women in the 18-to-24 and 35-to-49 age groups, and among women with household incomes upwards of $25,000. Respondents in the West had the biggest percentage of athletic footwear customers noted on a regional basis—56.1% compared with a low of 28.2% in the Northeast.

(continued)

Athletic Footwear (continued)

Most women, particularly those who were 35 years of age and older, said they usually purchased their athletic shoes in department stores. Specialty athletic footwear stores were the second most popular outlet type, and were the Number One outlet for women 18 to 24 years of age.

Purchase Patterns For Athletic Footwear By Age & Income
(% of Female Respondents)

		Age				Household Income (thous.)		
	Total	18-24	25-34	35-49	50+	Under $25	$25-$34.9	$35+
Purchasers of athletic footwear	38.7%	54.5%	52.5%	39.3%	20.3%	31.5%	46.9%	45.3%
Usual place of purchase of athletic footwear:								
Total female purchasers	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Department store	28.6	14.6	30.6	30.5	35.0	35.5	21.1	26.5
Specialty athletic footwear store	21.4	29.2	24.7	20.3	7.5	14.0	26.3	32.3
Shoe store-conventional	13.7	10.4	15.3	11.9	17.5	17.2	11.8	5.9
Shoe store-discount	8.1	8.3	4.7	11.9	10.0	9.7	9.2	--
Sporting goods store								
General-line	16.7	16.7	12.9	22.0	17.5	12.9	17.1	23.5
Specialty-line	9.4	18.8	10.6	1.7	7.5	8.6	11.8	11.8
Other outlets and no answer	2.1	2.0	1.2	1.7	5.0	2.1	2.7	--

Of those women in the survey who were identified as sports-minded, and had purchased functional athletic footwear for themselves at sometime, almost 81% had purchased one or more pair in 1980. A lower level of purchases was indicated for 1981, however, as overall only 69% had plans to buy athletic footwear as of the time of the interview at the end of 1980. In 1980, 36% of the women who bought any athletic shoes bought more than one pair; for 1981, about 22% said they would buy more than one pair.

Percent of Women Who Had Ever Bought Athletic Footwear For Themselves Who Purchased in 1980 & Percent Who Expect To Buy Athletic Footwear in 1981

		Age				Household Income (thous.)		
	Total	18-24	25-34	35-49	50+	Under $25	$25-$34.9	$35+
Women who ever purchased athletic footwear	100.0%	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Bought 1 or more pair in 1980	80.8	85.4	82.4	81.4	70.0	76.3	85.5	82.4
Expect to buy in 1981	69.2	81.2	69.4	71.2	50.0	65.6	75.0	70.6

BUYING HABITS—WOMEN

Attitudes Toward Imports

The survey among a sample of 604 adult women throughout the country, conducted for Footwear News Magazine developed informational attitudes toward imported shoes in general, and those from specific countries, as noted below.

	% Who Ever Look At Labels To See Country Where Shoes Were Made	% Who Will Not Buy Shoes From Specific Countries	Countries Most Frequently Mentioned (In order of no. of mentions*)
Total respondents—	64.6%	18.7%	
Age:			
18 - 24	46.6	11.4	Taiwan, Japan (72.7%)
25 - 34	64.8	13.0	Japan, Korea, Taiwan, Italy (60.0%)
35 - 49	70.0	26.7	Taiwan, Japan, Korea, "Any"** (54.2%)
50 - 64	62.5	20.6	"Any," Taiwan, Japan (63.9%)
65+	78.7	18.0	"Any," Italy, Taiwan (76.9%)
Household income:			
Under $35,000	63.9	18.2	Taiwan, "Any," Japan (56.0%)
$35,000+	69.3	20.0	Taiwan, Japan, Korea (66.6%)
Region:			
Northeast	75.4	25.4	
North Central	62.1	20.7	
South	57.9	12.3	
West	66.3	18.4	
Fashion forerunner	60.0	15.7	

*Percentages represent the share of total mentions of all countries represented by the listed countries.

**Covers response "any country outside of the U.S."

Close to a third of the women respondents, overall, said all of the dress or casual shoes they purchased in 1980 were made in this country, but there was a wide range in answers based on age groups—rising from only 16% of women 18 to 24 to over 57% of those 65 and older.

The biggest percentage of women who said that less than half of the dress and casual shoes purchased last year were made in the U.S. was noted among those 25 to 49 years of age (25%). Women who are fashion forerunners are less inclined than other women to buy only U.S.-made shoes.

Usual Place of Purchase

The biggest percentage of women interviewed in the Footwear News Magazine survey said they usually buy their dress and casual shoes in regular-price shoe stores, with department stores mentioned by the second largest group.

Differences in the pattern were noted in terms of respondent characteristics and by region.

(continued)

Usual Place of Purchase (continued)

Store Types Where Casual & Dress Shoes Are Usually Bought
(% of Respondents)

		Age Group					Income (thous.)			
	Total	18-24	25-34	35-49	50-64	65+	Under $25	$25-$34.9	$35-$49.9	$50 & Over
Women's casual shoes										
Total respondents	100.0%	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Reg.-price shoe store	43.0	54.5	42.0	40.0	36.8	54.1	44.7	41.4	35.7	52.6
Department store	28.3	23.9	35.8	27.3	27.2	16.4	23.1	32.1	41.1	21.1
Mass merchandiser	11.3	5.7	11.1	11.3	15.4	9.8	14.2	10.5	5.4	5.3
Discount shoe store	8.4	8.0	5.6	10.7	9.6	8.2	8.5	8.6	7.1	5.3
Apparel store	1.3	--	0.6	2.0	2.9	--	1.0	0.6	5.4	5.3
Discount store	4.1	3.4	3.1	5.3	3.7	6.6	4.7	2.5	3.6	10.5
Other outlets*	2.4	2.2	0.6	2.0	4.4	3.2	2.7	2.5	--	--
Women's dress shoes										
Total respondents	100.0%	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Reg -price shoe store	49.5	59.1	50.6	46.0	40.4	65.6	50.2	50.0	37.5	47.4
Department store	26.7	19.3	30.2	27.3	29.4	16.4	23.7	30.2	32.1	26.3
Mass merchandiser	9.9	2.3	9.9	11.3	14.0	8.2	2.7	3.7	8.9	5.3
Discount shoe store	5.3	6.8	2.5	6.0	7.4	3.3	5.1	4.3	7.1	5.3
Apparel store	3.6	8.0	3.1	4.0	2.9	--	2.7	3.7	8.9	5.3
Discount store	3.0	2.3	1.9	4.0	3.7	3.3	2.7	1.9	5.4	10.5
Other outlets*	1.3	1.1	1.8	0.7	0.7	2.2	2.7	--	--	--

*Includes mail order, PX/Base Exchanges, sporting goods stores and other outlets. The balance have no preference or do not buy the specified shoe type.

Store Selection

In selecting a store where shoes are usually purchased, based on interviews for Foorwear News Magazine, women rated these considerations in order of importance: 1st: price, 2nd: fashion or style; 3rd: convenience of store location; 4th: sales help.

Relative importance of these factors showed some variations in terms of demographic characteristics. To women age 25 to 34, price is more important in selecting a shoe retailer than to female customers in other age groups. Younger women 18 to 24 generally give higher priority to fashion or style selection than to price in selecting a store, as do women classified as fashion forerunners, and those with household incomes of $35,000 and up. Store location and sales help are stressed more by women 65 and over than by younger women.

Women generally visit more stores when shopping for shoes than do men—averaging 3.49 stores versus 3.11. Younger customers are the biggest shoppers. Among women surveyed who were 18 to 24, an average of 4.18 stores were usually visited before a final buying decision on shoes was made. In the 25-34 age group, the average number of stores shopped numbered 3.66. Among women most interested in fashion, the store average was 3.62.

BUYING HABITS

Teens—(Female)

In September 1980, Seventeen Magazine conducted a mail survey among several of their Consumer Panels, representing a cross section of the teenage market and their spending for back-to-school wardrobe.

Findings were represented by a total of 9,176,000 teenage-female students in the U.S., who spent $6.8 billion on their back-to-school wardrobes. Expenditures for footwear represented 12.1% of the total. About 92% of the teenagers bought shoes, averaging close to three pairs per purchaser, for which they spent $677.1 million. Boots were purchased by about 25% of the teenagers. The per capita average was 1.17 pairs, and total spending for boots amounted to $148.0 million.

Details on footwear purchases by type were reported as follows:

Purchases of Footwear By Teenage Students (Female) For Back-To-School, 1980

Footwear Type	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Casual-Flats	4,736	5,451	$157,202
-Heels	1,823	2,194	65,317
Dress-up-Heels	3,546	4,365	130,941
-Flats	956	1,053	33,040
Sandals/Thongs	1,547	1,874	30,831
Clogs	1,978	2,127	58,608
Sneakers-Jogging	2,674	2,907	78,465
-Tennis	2,175	2,360	56,089
Wooden bottom (not clogs)	438	451	9,369
Formal evening	620	672	21,617
Moccasin-type shoes	1,116	1,172	32,000
Slippers	399	428	3,595
Boots-Leather/Suede	594	622	31,349
-Work/Desert	110	113	4,868
-Storm/Rain	253	253	7,000
-Western/Cowboy	1,477	1,502	97,639
-Ankle boots	153	160	7,195
Total girls buying footwear	8,584	27,704	$825,125
Total girls buying shoes	8,476	25,054	$677,074
Total girls buying boots	2,268	2,650	$148,051

Source: Seventeen's Back-To-School Study (1981).

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now--1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store types.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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Market Pacesetters
(Young Adults)

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MARKET PACESETTERS (YOUNG ADULTS)

Introduction

For over two decades the attention of marketers has been concentrated on the Youth Market, which had been brought to its unprecedented importance by the tremendous baby boom that occurred after World War II.

Now this baby boom era population has aged. It is moving into mature age groups, 25 - 44, which in the next decade will be the fastest growing segment, with tremendous importance as it reaches peak earning power and economic clout. Meanwhile, the 18-to-24 year olds will decline in number and influence. The 25-44 year old segment will virtually dominate the entire baby boom generation, with the 35-44 group showing the fastest growth, gaining a million a year through the next decade. Four out of every nine additional households will be headed by someone between 35 and 44.

Within the growing young adult market is an unusually well-favored group, the Superclass or Market Pacesetters, who have a concentration of buying power that is unique.

These are the well-educated, professional-managerial working couples who command more discretionary income than any other group. They have distinct lifestyles and buying patterns, dressing differently, eating differently, traveling to different places and having different values than other Americans. They have fewer children than households in this age group in the past, and more time and money to cater to their own needs and desires.

Marketers' attempts to keep up with this emerging market force are becoming very evident. New magazines designed to appeal to the special interests of the young adults are coming out almost daily, older publications are being restyled, television programming is changing, new leisure products are being developed to catch their fancy.

Many questions may arise regarding the future course of these young adults as they encounter the tremendous competition ahead and realities that do not merge with the great expectations that tend to be centered to such a great degree on personal development and satisfaction. Regardless of this, they are now emerging as a tremendous force that will dominate the marketplace for many years ahead.

Audrey S. Balchen, Director
Market Research Division

THE SIZE OF THE MARKET

Population Trends

The changing structure of the U.S. population in terms of age groups was a major development in the 1970's. The concentration of numbers among the youth population began a shift that is continuing into older age groups—a shift having enormous repercussions on marketing plans and strategy. At the same time economic and political developments have fostered changes in outlook toward a more conservative stance on the part of young adults.

In 1979 the size of the U.S. population age 18 to 24 years showed a 19.7% gain over the number reported for 1970, bringing the total to 29.3 million. There were 35 million persons age 25 to 34, representing a gain of 39.3% in 1979 compared with 1970. Meanwhile, the overall gain in the total population was only 8.0%.

The 25-34 group represented 15.9% of the U.S. population in 1979, up from 12.3% in 1970. The 35-44 year group represented 11.4% in both 1979 and 1970, while the 18-24 group increased from 12.0% to 13.3%.

The tremendous growth in the 25-34 group was a result not only of the early part of the baby boom years (1945 to 1954), but also reflects the relatively small size of this age group in 1970 due to the low birth totals that prevailed in 1936 to 1945.

The 25-34 group will continue to grow, but at a slower rate than noted in recent years. The bulge in the population is shifting over to older groups, and the 35-44 year group will show the fastest growth in the 1980's and 1990's. By 1985, it is expected that the population age 35 to 44 will show a gain of about 25% compared with the 1979 level, while the 25-34 group will show a gain of about 14%. The 18-24 group, on the other hand, will show a complete reversal of the trends in the 1970's, and by 1985 will diminish in size, falling below the 1979 total.

Total U.S. Population Age 18-44 Years, 1970, 1979, Projected 1985, 1990
(in thousands)

Year	Total	Male	Female
1970			
Total, 18-44 years	72,814	36,119	36,696
18-24	24,455	12,322	12,134
25-34	25,146	12,448	12,698
35-44	23,213	11,349	11,864
1979			
Total, 18-44 years	89,445	44,437	45,008
18-24	29,285	14,762	14,523
25-34	35,024	17,402	17,622
35-44	25,136	12,273	12,863
1985			
Total, 18-44 years	99,089	49,227	49,861
18-24	27,854	14,028	13,825
25-34	39,859	19,825	20,034
35-44	31,276	15,374	16,002

(continued)

THE SIZE OF THE MARKET

Population Trends (continued)

Total U.S. Population Age 18-44 Years, 1970, 1979, Projected 1985, 1990
(in thousands)
(continued)

Year	Total	Male	Female
1990			
Total, 18-44 years	102,827	51,066	51,758
18-24	25,148	12,678	12,470
25-34	41,086	20,424	20,663
35-44	36,592	17,964	18,626

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, Nos. 614, 870, 704 (Series II Projections).

Trends in the 18-44 Population, 1970-1990

Percent Change in Population

	Total		
	1979/70	1985/79	1990/85
Total, all ages	+ 7.7%	+ 5.6%	+ 4.6%
18-44 years, total	+22.3	+10.8	+ 3.8
18-24	+18.6	- 4.9	- 9.7
25-34	+38.5	+13.8	+ 3.1
35-44	+ 8.6	+24.8	+16.6

	Male			Female		
	1979/70	1985/79	1990/85	1979/70	1985/79	1990/85
Total, all ages	+ 7.2%	+ 5.5%	+ 4.5%	+ 8.1%	+ 5.6%	+ 4.6%
18-44 years, total	+22.5	+10.8	+ 3.7	+22.1	+10.8	+ 3.8
18-24	+18.7	- 5.0	- 9.6	+18.5	- 4.8	- 9.8
25-34	+39.0	+13.9	+ 3.0	+38.0	+13.7	+ 3.1
35-44	+ 8.5	+25.3	+16.8	+ 8.8	+24.4	+16.4

Percent to Total U.S. Population

	Total			
	1970	1979	1985	1990
Total, all ages	100.0%	100.0%	100.0%	100.0%
18-44 years, total	35.7	40.6	42.5	42.4
18-24	12.0	13.3	12.0	10.3
25-34	12.3	15.9	17.1	16.9
35-44	11.3	11.4	13.5	15.0

(continued)

Population Trends (continued)

Trends in the 18-44 Population, 1970-1990
(continued)

Percent to Total U.S. Population
(continued)

	Male				Female			
	1970	1979	1985	1990	1970	1979	1985	1990
Total, all ages	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
18-44 years, total	36.2	41.3	43.4	43.1	35.2	39.8	41.7	41.4
18-24	12.4	13.7	12.4	10.7	11.7	12.8	11.6	10.0
25-34	12.5	16.2	17.5	17.2	12.2	15.6	16.8	16.5
35-44	11.3	11.4	13.6	15.2	11.3	11.4	13.4	14.9

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, Nos. 614, 870, 704 (Series II Projections, which represent the middle of a series of three projections on future population size).

In summary, over the next 10 years, while the U.S. population is expected to expand by somewhat less than 10%, persons in the 25-44 age bracket will increase in number over twice as fast. Just about all other segments of the population will grow at a less than average rate, or remain static. By the end of the 1980's there will be some 20 million more Americans than at the start of the decade. Of that number, 16 million will be accounted for by persons aged 25-44. The 35-44 age group will expand most rapidly, particularly in the second half of the period; the 25-34 group will be growing more slowly, but still at a very substantial pace. This is the key age for the formation of new households, bringing with it the demand for housing and home furnishings.

Pending release of findings in the complete census of population, covering the year 1980, the following for 1979 are the latest counts on the number of men and women by specific years of age within the 18-44 age bracket.

Population Trends (continued)

Population of the U.S. by Sex & Race, 18-44 Years of Age: July 1979
Total Including Armed Forces Overseas
(in thousands)

	Total			White			Black & Other Races		
	Total	Male	Female	Total	Male	Female	Total	Male	Female
Total, 18-44 yrs.	89,445	44,437	45,008	77,129	38,645	38,482	12,317	5,793	6,525
18-24 years	29,284	14,762	14,523	24,863	12,591	12,271	4,421	2,171	2,251
18	4,291	2,172	2,119	3,625	1,839	1,786	666	334	333
19	4,267	2,155	2,112	3,612	1,829	1,782	655	325	330
20	4,356	2,207	2,149	3,683	1,871	1,812	674	337	589
21	4,234	2,151	2,083	3,603	1,837	1,766	631	314	317
22	4,156	2,093	2,064	3,534	1,790	1,744	623	302	320
23	3,952	1,975	1,977	3,363	1,693	1,670	589	283	307
24	4,027	2,008	2,019	3,443	1,732	1,711	584	276	308
25-34 years	35,025	17,402	17,622	30,309	15,219	15,090	4,716	2,184	2,532
25	3,897	1,946	1,951	3,343	1,685	1,658	554	262	292
26	3,746	1,869	1,876	3,231	1,628	1,603	515	273	433
27	3,699	1,841	1,858	3,184	1,602	1,582	515	239	277
28	3,617	1,797	1,820	3,122	1,568	1,555	494	229	266
29	3,482	1,727	1,754	2,997	1,503	1,495	484	225	260
30	3,697	1,834	1,863	3,171	1,590	1,581	526	244	282
31	3,495	1,738	1,757	3,052	1,533	1,519	443	204	238
32	3,788	1,884	1,904	3,352	1,684	1,669	435	200	235
33	2,741	1,357	1,384	2,382	1,193	1,189	359	164	196
34	2,863	1,409	1,454	2,473	1,232	1,241	390	177	213
35-44 years	25,136	12,273	12,863	21,957	10,835	11,121	3,180	1,438	1,742
35	2,897	1,421	1,476	2,530	1,254	1,276	366	167	200
36	3,060	1,501	1,559	2,698	1,337	1,361	362	164	198
37	2,696	1,318	1,377	2,354	1,164	1,190	342	155	187
38	2,545	1,243	1,303	2,215	1,094	1,121	330	149	181
39	2,417	1,177	1,239	2,105	1,037	1,068	311	140	171
40	2,384	1,160	1,224	2,080	1,024	1,057	304	137	167
41	2,358	1,148	1,210	2,057	1,013	1,045	301	135	166
42	2,288	1,114	1,174	1,997	983	1,014	291	131	160
43	2,263	1,101	1,161	1,977	972	1,005	286	129	157
44	2,229	1,089	1,140	1,943	958	984	286	131	155

(continued)

Population Trends (continued)

Population of the U.S. by Sex & Race, 18-44 Years of Age: July 1979
Total Including Armed Forces Overseas
(in thousands)

	Total			White			Black & Other Races		
	Total	Male	Female	Total	Male	Female	Total	Male	Female
				Resident Population (in thousands)					
Total, 18-44 years	88,968	43,994	44,974	76,954	38,318	38,457	12,195	5,678	6,516
18-24	29,030	14,529	14,501	24,680	12,426	12,254	4,350	2,105	2,246
25-34	34,863	17,252	17,611	30,186	15,105	15,083	4,677	2,148	2,528
35-44	25,075	12,213	12,862	21,908	10,787	11,120	3,168	1,425	1,742
				Civilian Population (in thousands)					
Total, 18-44 years	83,412	42,541	44,869	75,538	37,152	38,375	11,884	5,390	6,494
18-24	24,190	13,758	14,430	24,024	11,825	12,200	4,166	1,935	2,230
25-34	34,370	16,790	17,580	29,786	14,727	15,058	4,584	2,062	2,522
35-44	24,852	11,993	12,859	21,718	10,600	11,117	3,134	1,393	1,742
Median Age (years)	30.1	29.0	31.3	31.1	29.8	32.3	24.9	23.7	26.1

Based on total U.S. population

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-25, No. 870.

SIZE OF THE YOUNG ADULT MARKET

Regional Distribution of the Population

The largest concentration of young adults (18 to 44 years of age) in the U.S. is in the East North Central Region (Ohio, Indiana, Illinois, Michigan and Wisconsin). In 1979 this region had 18.9% of the nation's total population in this age bracket.

As a percent of the total population in each region, however, young adults were most heavily concentrated in the Pacific region (Washington, Oregon, California, Alaska and Hawaii) In this region the population 18 to 44 years old accounted for 42.4% of the total— up from 37.3% in 1970.

Regional Distribution of the U.S. Population, 18-44 Years of Age, 1979

	Total Population (thous.)	Population 18-44		% of Regional Total	
		Number	%	1979	1970
Population 18 to 44 years old	220,100	88,968	100.0%	40.4%	35.3%
Regions					
Northeast	12,291	4,969	5.6	40.4	34.6
Middle Atlantic	36,711	14,301	16.1	39.0	34.5
East North Central	41,287	16,791	18.9	40.7	34.9
West North Central	17,118	6,809	7.6	39.8	33.6
South Atlantic	34,976	14,173	15.9	40.5	36.3
East South Central	14,105	5,594	6.3	39.7	34.8
West South Central	22,470	9,097	10.2	40.5	35.4
Mountain	10,673	4,361	4.9	40.9	36.0
Pacific	30,469	12,873	14.5	42.2	37.3

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, Nos. 875.

Geographical Mobility

Movers typically have different characteristics than persons who do not move. The impact of mobility on the areas of origin as well as of destination may very well change the demographic character of these areas even if the in—out flows balance out. If an area has a net loss of population, the movers are likely to be younger and better educated than those left behind.

The highest mobility rates are found among persons in their twenties when many are establishing their own households, starting new jobs, finishing school or service in the Armed Forces, or getting married.

In the four-year period between March 1975 and March 1979, according to the U.S. Census Bureau, 72% of the persons 25 to 29 years old in 1979 and 63% of those 20 to 24 years old had changed residence, compared with only 40% of the total population four years old and over.

The higher the level of education, the greater likelihood of a move. Between March 1975 and March 1979, only 26% of persons who had completed eight or more years of school moved to a different house in the U.S., while 39% of those with one to four years of high school, and 48% of those with at least some college moved.

SIZE OF THE YOUNG ADULT MARKET

Geographical Mobility (continued)

Mobility of the Population 20-44 Years of Age, By Sex
(From March 1975 to March 1979)

	Male (By Age)				Female (By Age)			
	20-24	25-29	30-34	35-44	20-24	25-29	30-34	35-44
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Same house (nonmovers)	38.6	24.5	37.4	57.2	29.7	25.6	43.7	62.7
Central cities of SMSA's	10.5	7.5	9.2	13.3	8.6	7.9	11.9	15.8
Balance of SMSA's	16.6	8.7	15.7	25.4	13.5	9.7	17.9	26.9
Outside SMSA's	11.5	8.3	12.4	18.5	7.7	8.0	13.8	19.9
Different house in U.S. (movers)	58.4	71.8	60.5	41.1	68.3	72.1	54.5	35.9
Movers from abroad	3.1	3.6	2.1	1.7	2.0	2.3	1.8	1.4

Source: U.S. Bureau of the Census,
Current Population Reports,
Population Characteristics, Series P-20, No. 353.

MARITAL STATUS

After age 24, the majority of young adults in the U.S. population are married and living with their spouses, although the trend has been for marriage at a later age. In 1979, the median age at first marriage for males was 24.4—the oldest reported since 1920, when it was 24.6 years. For females, the median age at first marriage in 1979 was 22.1, the oldest median recorded by the Census Bureau.

Marital Status of Person 18-44 Years of Age in the U.S., March 1979

	Age Groups					
Males	18-19	20-24	25-29	30-34	35-39	40-44
Total (thousands)	4,017	9,713	8,812	7,907	6,458	5,482
Marital status:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Single	94.9	67.4	30.2	14.9	8.2	8.4
Married - spouse present	4.2	28.8	61.4	73.6	81.6	80.2
Other status	0.9	3.8	8.4	11.5	10.2	11.4
Females						
Total (thousands)	4,184	10,136	9,128	8,206	7,827	5,844
Marital status:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Single	83.1	49.4	19.6	9.5	6.6	5.1
Married - spouse present	14.2	43.1	67.0	74.4	77.2	75.6
Other	2.7	7.5	13.4	16.1	16.2	19.3

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 349.

FAMILY & NON-FAMILY HOUSEHOLDS

As of March 1980 there was a total of 79.1 million households in the United States, an increase of 15.7 million, or 24.7%, compared with the 1970 total. This total consisted of family households and non-family households—the later made up of individuals living alone or of unrelated individuals living together.

While the total count on households rose 24.7%, a much sharper gain was noted in the number of households with heads up to 45 years of age in 1980 compared with 1970, particularly households with heads 30 to 34 years of age, which showed a gain of 60.5%. The growing tendency of young adults to live independently from parents before forming families of their own was a factor in the sharp gains noted in households with younger heads, as well as the large number of young adults entering the ages at which they form households.

Households in the U.S. With Heads Under 45 Years of Age, 1970-1980

	Number (in thousands)					% Change	% To Total	
	1980	1979	1978	1977	1970	1980/1970	1980	1970
All U.S. households	79,080	77,330	76,030	74,142	63,401	+ 24.7%	100.0%	100.0%
Households with heads under 45, total	38,170	36,666	36,020	34,640	27,878	+ 36.9	48.3	44.0
Under 25 years	6,362	6,342	6,220	5,991	4,341	+ 46.6	8.1	6.8
25 to 29 years	8,912	8,679	8,598	8,385	6,152	+ 44.9	11.3	9.7
30 to 34 years	8,986	8,317	8,253	7,782	5,600	+ 60.5	11.4	8.8
35 to 44 years	13,910	13,328	12,969	12,482	11,785	+ 18.0	17.6	18.6

Projected Growth in Households With Heads Under 45 Years of Age, 1985-1995

	Number (in thousands)			% Change		% To Total	
	1995	1990	1985	1995/1985	1990/1980	1995	1985
All U.S. households	107,528	98,950	89,705	+19.9%	+25.1%	100.0	100.0
Households with heads under 45, total	55,233	51,874	46,191	+19.6	+35.9	51.4	51.5
Under 25 years	7,597	7,112	7,137	+ 6.4	+11.8	7.1	8.0
25 to 29 years	10,736	11,261	10,693	+ 0.4	+26.4	10.0	11.9
30 to 34 years	13,063	12,467	10,840	+20.5	+38.7	12.1	12.1
35 to 44 years	23,837	21,034	17,521	+36.0	+51.2	22.2	19.5

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 357, 805 (Series A--highest of a series of four projections).

FAMILY & NON-FAMILY HOUSEHOLDS

A first-step in defining the lifestyles of young adults can be taken by looking at basic information on their living arrangements—whether living with families as family heads, as family members, or in separate households, either alone or with unrelated people.

Most young adults live in family situations, either as head or family member. For males, the lowest percentage in terms of age groups was noted among men 25 to 29 and 20 to 24 years of age. The percentage in each of these groups who lived in families was 78.2% and 79.2%, respectively. This compares with 85% or more among males in age groups ranging up to 45. The remainder live in households consisting of unrelated individuals or live alone.

The percentage of women who live in family situations was higher than the comparable figures by age brackets for men. The lowest percentage of young women living in families was in the 20-24 age group—83.0% (which compares with 79.2% noted for men in this bracket).

Family/Household Status of Persons 18 to 44 Years of Age, by Sex, 1979

		Age Groups (number in thousands)					
	Total	18-19	20-24	25-29	30-34	35-39	40-44
Males, total	42,389	4,017	9,713	8,812	7,907	6,458	5,482
In families	35,624	3,720	7,692	6,895	6,693	5,732	4,892
Family head	24,696	194	2,954	5,579	5,976	5,419	4,574
Family member	10,928	3,526	4,738	1,316	717	313	318
In non-family households							
Household head*	4,781	160	1,300	1,409	902	585	525
Unrelated household member	1,982	137	721	507	312	141	164
		Percent in Each Age Group					
Males, total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
In families	84.0	92.6	79.2	78.2	84.6	88.8	89.2
Family head	58.3	4.8	30.4	63.3	75.6	83.9	83.4
Family member	25.7	87.8	48.8	14.9	9.1	4.8	5.8
In non-family households							
Household head*	11.3	4.0	13.4	16.0	11.4	9.1	7.8
Unrelated household member	4.7	3.4	7.4	5.8	3.9	2.2	3.0
Females, total	44,325	4,184	10,136	9,128	8,206	6,827	5,844
In families	39,628	3,812	8,414	7,910	7,573	6,437	5,482
Family head	4,757	97	680	1,016	1,112	956	896
Family member	34,871	3,715	7,734	6,894	6,461	5,481	4,586
In non-family households							
Household head*	3,078	145	976	896	467	298	296
Unrelated household member	1,619	227	746	322	165	93	66

(continued)

Family/Household Status of Persons 18 to 44 Years of Age, by Sex, 1979
(continued)

		Percent in Each Age Group					
	Total	18-19	20-24	25-29	30-34	35-39	40-44
Females, total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
In families	89.4	91.1	83.0	86.7	92.3	94.3	93.8
Family head	10.7	2.3	6.7	11.1	13.6	14.0	15.3
Family member	78.7	88.8	76.3	75.5	78.7	80.3	78.5
In non-family households							
Household head*	6.9	3.5	9.6	9.8	5.7	4.4	5.1
Unrelated household member	3.7	5.4	7.4	3.5	2.0	1.4	1.1

*The Census Bureau calls these primary individuals. They may live alone or with unrelated persons. Of the 4,781,000 males in the 18-to-44 age group who are in this category, 3,433,000 males (71.8% of the total) lived alone. Of the female heads of unrelated households, numbering 3,078,000 in the 18-to-44 age group, 2,348,000 (76.3% of the total) lived alone.

Source: Based on U.S. Bureau of the Census, Population Characteristics, Series P-20, No. 349.

Household growth is difficult to predict since much depends on choices in lifestyle. Lifestyles have changed rapidly in the past 10 years and could change again in unforeseen ways. Reflecting this uncertainty, the Census Bureau has issued four projections of household growth in the 1980's. They range from a 23% increase from an estimated 80 million households in 1980 to a 16% gain—with a difference of over five million households.

The "baby boom" generation, which moved into young adult and middle age in the 1980's, generally left their parents' homes at an earlier age than in earlier years. Another development has been that many have married later, or not at all. The proportion of women between age 25 and 29 who had never married rose to 19.6% in 1979 from 10.5% in 1960; for men, the proportion increased to 30.2% from 28%.

Among those who did marry, divorce was increasingly common. The divorce rate since 1970 has about doubled overall, but the rate for those between 30 and 44 has been even higher. All this has contributed to a great increase in the unrelated households and single households.

Whether the baby boom group will return to more traditional lifestyle patterns is a question. If it does, household growth could be sluggish as fewer people will reach the household-establishing age in the 1980's than in the past decade. But if present trends continue, household growth would be rapid.

Regional Growth

The fastest growth in all regions of the country in the years ahead will be in households with heads age 35 to 44 years. The greatest concentration of these households will be in the South, where the number is expected to increase by almost 29% in 1985 compared with 1980, and by over 20% in 1990 compared with 1985.

Trends in the Number of Young Families & Unrelated Individuals (Consumer Units) By Regions, 1980-1990

(Number in thousands)

Region & Age (Householder)	1980	1985	1990	% Change 1985/1980	% Change 1990/1985
Northeast					
Under 25	1,448	1,482	1,444	+ 2.3%	- 2.6%
25 - 34	4,082	4,505	4,894	+10.4	+ 8.6
35 - 44	3,286	4,052	4,610	+23.3	+13.8
North Central					
Under 25	2,358	2,319	2,158	- 1.6	- 6.9
25 - 34	5,175	5,806	6,108	+12.2	+ 5.2
35 - 44	3,640	4,576	5,361	+25.7	+17.1
South					
Under 25	2,630	2,728	2,741	+ 3.7	+ 0.5
25 - 34	6,370	7,365	7,891	+15.6	+ 7.1
35 - 44	4,803	6,190	7,461	+28.9	+20.5
West					
Under 25	2,265	2,526	2,761	+11.5	+ 9.3
25 - 34	4,510	5,212	5,641	+15.5	+ 8.2
35 - 44	3,033	3,917	4,735	+29.1	+20.9

Source: American Demographics, March 1981 based on data supplied by The Planning Economics Group, Boston.

Singles & Unrelated Households

As noted, a dramatic increase has occurred in the number of American households consisting of persons living alone. According to a U.S. Census Bureau report, more than one-fifth of all households in 1979 were single-person households. The number of such households grew by nearly 60% over a nine-year period, from 10.9 million in 1970 to 17.2 million in 1979.

Although 62% of all single-person households were maintained by women, the proportion maintained by men exceeds the count for females among persons under 45 and the proportion of male single households has grown more rapidly since 1970 than for women. The largest overall increases during this decade have been for young adult men (under 25) living alone.

(continued)

Singles & Unrelated Households (continued)

Among males up to 45 years of age, over 3.4 million lived alone in 1979, a gain of 184.4% compared with 1970. Men who lived alone and who were under 45 years of age represented over half (53.1%) of all male single households in 1979. This compares with 34.2% in 1970.

Over one-fourth of the men living alone were 25 to 34 years of age in 1979, compared with 15.1% in 1970. The fast rate of growth in singles in this age group—up 218% in the nine-year period— is significant for marketers of many types of upscale consumer goods.

Among single householders under 45 years of age, men outnumber women. Most women living alone are 45 or over, younger women representing only about 22%. However, this compares with their 13.1% share of the total in 1970. As in the case of men, the fastest growth in the loners under 45 has been noted in the 25-34 age group.

The fast growth in single-person households among young adults has come during a period of postponement of first marriages as well as rising divorce rates. It may also reflect an increasing desire among young adults to seek advanced education and careers before marriage. The postponement of marriage by young adults continues to increase. Among women 20-24 nearly half had never married, according to a report for 1979 by the Census Bureau. This marks an increase of two-thirds in the proportion of singles since 1960. Delay of first marriages continues to a lesser extent, among women 25 to 29.

A study by Chase Econometrics published early in 1981 indicated that by 1990 half of all U.S. households will be single-person, one-income households. It was pointed out that these trends suggest that mass-market consumer goods and services face a disappointing decade, while luxury goods and services should fare well. A person living alone tends to spend more money on companionship-related activities like travel and entertainment than a family does. People who live alone have more or less the same fixed costs that a working couple has, but they have less income, so they save less. Since there is no one with which to share the chores, singles tend to buy more services, from car repair to lawn care.

Singles tend to spend more on luxury durables like cars, but less on such items as appliances, since so many of them live in apartments. In a study of spending patterns by family size, the brokerage firm of Loeb Rhoades & Co. found that the average person who lives alone spends as much on restaurant meals as married couples do and only slightly less than a family of three.

According to a projection by the U.S. Census Bureau, about 26% of all households will consist of only one person by 1985. Other sources estimate singles will account for 30% or more by that year. However, the trend may be slowed if the tendency of unmarried couples to live together increases and if the marriage rate goes up among young people.

Singles & Unrelated Households (continued)

Persons Living Alone by Sex & Age, 1970, 1979

	1979		1970		% Change
	Thous.	%	Thous.	%	1979/1970
Males living alone					
Total, all ages	6,464	100.0%	3,532	100.0%	+ 83.0%
Under 45 years of age	3,433	53.1	1,207	34.2	+184.4
Under 25 years	870	13.5	274	7.8	+217.5
25 to 34	1,701	26.3	535	15.1	+217.9
35 to 44	862	13.3	398	11.3	+115.6
Females living alone					
Total, all ages	10,738	100.0%	7,319	100.0%	+ 46.7%
Under 45 years of age	2,348	21.8	953	13.1	+146.4
Under 25 years	751	7.0	282	3.9	+166.3
25 to 34	1,079	10.0	358	4.9	+201.4
35 to 44	518	4.8	313	4.3	+ 65.5

Source: Based on U.S. Bureau of the Census, Population Characteristics, Series P-20, No. 349.

Most unrelated individuals, who live alone or with someone other than family members, who are in the 25-to-44 year age group, live within Standard Metropolitan Areas, and more specifically, within central cities. In 1979, 42.8% of the males of this age and 46.6% of the females lived in central cities; other parts of the Standard Metropolitan Areas accounted for 38.0% of the males, 36.5% of the females age 25-44.

One out of four females and 21.5% of males classified as "unrelated individuals," who were 25 to 44 years of age, lived in the largest SMA's (having a population of 3,000,000 or more).

Family Heads

Of all families in the U.S., numbering 57,804,000 in 1979, half had a head under 45 years of age. Most of the families headed by a person 25 to 44 years of age were home owners rather than renters. The percentage without children under 18 dropped from 28.3% among families with a head 25 to 29 years of age down to 13.5% of those with a head age 35 to 44.

(continued)

FAMILY & NON-FAMILY HOUSEHOLDS

Family Heads (continued)

Selected Characteristics of Families by Age of Head, Under 45 Years, 1979

	Age of Head (Years)									
	Total		Under 25		25-29		30-34		35-44	
	Thous.	%	Thous.	%	Thous.	%	Thous.	%	Thous.	%
Total families	29,069	100.0%	3,837	100.0%	6,473	100.0%	7,005	100.0%	11,754	100.0%
Tenure:										
Owner families	18,689	64.3	1,229	32.0	3,520	54.4	4,843	69.1	9,097	77.4
Renter families	10,379	35.7	2,607	68.0	2,952	45.6	2,163	30.9	2,657	22.6
Public housing	798	2.7	180	4.7	196	3.0	160	2.3	262	2.2
Private housing	9,581	33.0	2,427	63.3	2,756	42.6	2,003	28.6	2,395	20.4
Size of family:										
2 persons	7,008	24.1	2,001	52.1	2,168	33.5	1,323	18.9	1,516	12.9
3 or more persons	22,061	75.9	1,836	47.9	4,305	66.5	5,682	81.1	10,238	87.1
With own children, any age	21,469	73.9	2,169	56.5	4,644	71.7	5,963	85.1	10,693	91.0
Average no. under 18	--	--	1.39		1.71		2.03		2.26	

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 352.

EDUCATIONAL LEVELS/SCHOOL ENROLLMENT

The nation's young adults at the present time have completed substantially more years of school than earlier generations did. U.S. Census Bureau surveys show that 85% of persons age 25 to 34 years in 1979 were high school graduates. In 1970, only 74% of the population in this age group were high school graduates.

Among people 25 to 44 years of age, male college graduates continue to outnumber female graduates, although there has been a substantial increase in both groups since 1970. In 1979 close to 28% of the 24-to-34 year old males were college graduates compared with 19.7% in 1970. Comparable figures for women were 20.0% versus 12.0%. The continually rising level of education, with its accompanying higher salaries, is a change of great significance to marketers.

(continued)

Years of School Completed by the U.S. Population 18-44 Years of Age, 1979

	Total	Age (Years)					
Males	18-44	18-19	20-24	25-29	30-34	35-39	40-44
Total population (thous.)	42,389	4,017	9,713	8,812	7,907	6,458	5,482
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Schooling:							
Less than 4 yrs. high school	19.3	41.9	15.5	13.7	14.7	19.4	25.1
4 years of high school	38.7	47.0	43.4	36.4	33.4	37.6	36.8
College:							
1 - 3 years	22.0	11.1	31.5	24.1	22.0	16.9	15.8
4 years or more	20.0	--	9.6	25.8	29.9	26.1	22.3
Median school years completed: 1979		12.2	12.8	13.0	13.3	12.8	12.7
1972		12.2	12.8	12.8	12.6	12.3	
Females							
Total population (thous.)	44,325	4,184	10,136	9,128	8,206	6,827	5,844
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Schooling:							
Less than 4 yrs. high school	20.0	34.6	15.7	15.0	17.7	21.9	25.8
4 years of high school	45.6	51.5	45.5	42.0	44.5	45.9	47.3
College:							
1 - 3 years	20.1	13.9	28.9	22.0	18.4	15.9	13.3
4 years or more	14.3	--	9.9	21.0	19.4	16.2	13.6
Median school years completed: 1979		12.3	12.8	12.8	12.7	12.6	12.5
1972		12.3	12.5	12.8	12.6	12.3	

Source: Based on U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 356.

College Enrollment

As of 1979, 72.4% of the male college students 18-34 years of age were enrolled full-time, and 66.6% of the female students in the same age group. The number of women enrolled in college has increased dramatically, showing a rise of 66.5% in 1979 compared with 1970, while enrollment of males rose about 14% in the same span, for an overall gain of 35.1%.

Male college students still outnumbered females in the 20-29 year age group, however, but not among college students age 18 and 19, or among students over 29 years of age.

(continued)

College Enrollment (continued)

College Enrollment of Persons 18-34 Years of Age, 1979

	Total		Males		Females	
	Thous.	% of Total*	Thous.	% of Total*	Thous.	% of Total*
Enrolled in college						
Total, 18-34 years	9,665**	15.0%	4,864	15.1%	4,801	14.9%
18 - 19	2,844	33.2	1,341	31.0	1,503	35.5
20 - 24	4,146	20.0	2,167	20.8	1,979	19.2
25 - 29	1,679	9.1	893	9.7	786	8.5
30 - 34	996	6.0	463	5.6	533	6.4

* Represents the percent of the total population by sex and by age in each group.

**Of this total, 6,719 thousand students were on a full-time basis, including 3,521 thousand men, 3,198 thousand women.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 350.

Total School Enrollment

Of the male civilian population age 18 to 24 years, 30.2% were enrolled in schools of some type in 1979, either as part-time or full-time students. Although there was a 5.7% increase in the number of students compared with the 1970 total, men, age 18 to 24, who were enrolled in schools represented 37.4% of the population in this age group in 1970—the unusually high percentage prevailing in the early 1970's reflected the military draft requirements prevailing at that time.

There was a sharp increase in the percentage of women 18 to 24 years of age who were enrolled in school in 1979 compared with 1970, particularly in the 20-24 age group, where students represented 20.2% of the civilian noninstitutional population in this age/sex group in 1979 compared with 15.1% in 1970. There is a greater tendency among young women with jobs to attend school than noted for men. Over a third of the women 18 to 19 who were working were enrolled in school, compared with 29% of the men in 1979. Comparable figures for the 20-24 year group were 17% for women, 15.4% for men.

(continued)

Total School Enrollment (continued)

School Enrollment/Labor Force Status of the Population 18-34 Years Old, 1979

(Numbers in thousands)

Men	18-34		18-19		20-24		25-29		30-34	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total number	30,286	100.0%	4,023	100.0%	9,548	100.0%	8,753	100.0%	7,962	100.0%
Enrolled in school	5,491	18.1	1,874	46.6	2,229	23.3	910	10.4	478	6.0
In Labor Force	3,223	10.6	793	19.7	1,286	13.5	716	8.2	428	5.4
Employed	2,958	9.8	682	16.9	1,160	12.2	693	7.9	423	5.3
Unemployed	266	0.8	111	2.8	126	1.2	24	0.3	5	0.1
Not enrolled in school	24,795	81.9	2,149	53.4	7,319	76.7	7,843	89.6	7,484	94.0
In Labor Force	23,719	78.3	1,932	48.0	6,910	72.4	7,612	87.0	7,265	91.2
Employed	22,359	73.8	1,669	41.5	6,363	66.6	7,284	83.2	7,043	88.5
Unemployed	1,359	4.5	263	6.5	547	5.7	327	3.7	222	2.8
Women										
Total number	32,077	100.0%	4,191	100.0%	10,212	100.0%	9,259	100.0%	8,415	100.0%
Enrolled in school	5,265	16.4	1,819	43.4	2,061	20.2	818	8.8	567	6.7
In Labor Force	2,976	9.3	835	19.9	1,172	11.5	572	6.2	399	4.7
Employed	2,748	8.6	735	17.5	1,087	10.6	543	5.9	383	4.5
Unemployed	228	0.7	99	2.4	84	0.8	29	0.3	16	0.2
Not enrolled in school	26,812	83.6	2,372	56.6	8,151	79.8	8,441	91.2	7,848	93.3
In Labor Force	18,201	56.7	1,752	41.8	5,869	57.5	5,675	61.3	4,903	58.3
Employed	16,588	51.7	1,439	34.3	5,287	51.8	5,270	56.9	4,592	54.6
Unemployed	1,613	5.0	314	7.5	583	5.7	405	4.4	311	3.7

Source: U.S. Bureau of Labor Statistics,
Special Labor Force
Report 241 (January 1981).

EDUCATIONAL LEVELS/SCHOOL ENROLLMENT

Total School Enrollment (continued)

Employment Status of Population 16 to 34 by Type of School, 1979

(Numbers in thousands)

Men	Total No.	% in the Labor Force	No. Employed (Incl.Agricultural)	% of Nonagricultural Employment	
				Full-Time*	Part-Time
Enrolled in school, 16 to 34 years old	9,248	53.5%	4,947	37.4%	62.6%
Elementary or high school	4,264	47.2	2,015	12.0	88.0
16 & 17 years	3,638	46.0	1,672	6.3	93.7
18 & 19 years	533	50.3	268	25.4	74.6
20 to 34 years	94	79.2	74	92.0	8.0
College, full-time**	3,632	45.0	1,633	22.6	77.4
16 to 19 years	1,338	35.0	469	11.0	89.0
20 to 24 years	1,737	47.6	828	17.5	82.5
25 to 34 years	557	60.4	337	48.6	51.4
College, part-time	1,352	96.1	1,299	88.0	12.0
16 to 19 years	123	86.9	107	64.1	35.9
20 to 24 years	430	96.1	414	82.4	17.6
25 to 34 years	798	97.5	779	94.1	5.9
Women					
Enrolled in school, 16 to 34 years old	8,787	51.3	4,510	33.5	66.5
Elementary or high school	3,803	43.9	1,67[illegible]	8.1	91.9
16 & 17 years	3,340	43.8	1,464	4.3	95.7
18 & 19 years	316	44.7	141	12.8	87.2
20 to 34 years	147	45.1	66	78.9	21.1
College, full-time**	3,367	43.5	1,465	13.0	87.0
16 to 19 years	1,544	41.7	643	7.3	92.7
20 to 24 years	1,460	45.8	668	13.2	86.8
25 to 34 years	363	42.4	15[illegible]	36.1	63.9

* Covers persons who usually work 35 hours or more or who worked 35 hours in the survey week in October 1979.

**Students attending 12 hours or more of college classes during the average school week were classified as full-time students.

Source: U.S. Bureau of Labor Statistics,
Special Labor Force Report 241.

LABOR FORCE/EMPLOYMENT

Among the male population 18 to 24 years of age who were employed, a smaller percentage were enrolled in school in 1979 than noted in 1970, but the reverse was true for the female population of this age, as noted in the following table. The higher percentage of school enrollment among males in the early 1970's undoubtedly reflects reactions to military draft regulations.

School Enrollment & Employment Status of the Population 18-24 Years of Age
1970, 1979

	Men			Women		
	Total 18-24	18-19	20-24	Total 18-24	18-19	20-24
1979						
Civilian noninstitutional population (thous.)	13,571	4,023	9,548	14,403	4,191	10,212
Enrolled in school (thous.)	4,103	1,874	2,229	3,880	1,819	2,061
% of total population	30.2%	46.6%	23.3%	26.9%	43.4%	20.2%
Employed (thous.)	9,874	2,351	7,523	8,548	2,174	6,374
Enrolled in school (thous.)	1,842	682	1,160	1,822	735	1,087
% of employed enrolled in school	18.7%	29.0%	15.4%	21.3%	33.8%	17.0%
1970						
Civilian noninstitutional population (thous.)	10,385	3,349	7,036	12,167	3,609	8,558
Enrolled in school (thous.)	3,883	1,822	2,061	2,798	1,502	1,296
% of total population	37.4%	54.4%	29.3%	23.0%	41.6%	15.1%
Employed (thous.)	7,000	1,772	5,228	6,234	1,610	4,624
Enrolled in school (thous.)	1,596	635	961	1,108	488	620
% of employed enrolled in school	22.8%	35.8%	18.4%	17.8%	30.3%	13.4%

Source: U.S. Bureau of Labor Statistics.

Total Labor Force (Including Armed Services) Age 18-44

(Numbers in thousands)

		Males					Females				
Year	Total	Total	18-19	20-24	25-34	35-44	Total	18-19	20-24	25-34	35-44
1970	51,219	32,725	2,555	7,378	11,974	10,818	18,494	1,926	4,893	5,704	5,971
1975	59,767	36,275	3,050	8,186	14,456	10,583	23,492	2,407	6,116	8,473	6,496
1979	69,246	40,149	3,149	8,983	16,402	11,615	29,097	2,655	7,100	11,208	8,134
1981 (Feb.)	71,816	41,028	2,918	8,680	17,208	12,042	30,788	2,411	7,152	12,323	8,902
	Percent of Total Non-Institutional Population In Each Group Who Are In Labor Force										
1970	71.0%	91.6%	69.9%	86.6%	96.6%	97.0%	50.6%	53.7%	57.8%	45.0%	51.1%
1975	74.1	90.9	73.0	85.9	95.5	95.8	58.3	58.3	64.3	54.6	55.8
1979	78.2	91.7	73.9	87.6	95.6	95.9	65.5	63.1	69.3	63.9	63.6
1981 (Feb.)	78.1	90.2	69.0	84.9	94.8	95.3	66.2	57.8	68.6	66.4	66.7
	Not in the Labor Force (thousands)										
1970	20,925	3,003	1,099	1,142	422	340	17,922	1,660	3,579	6,972	5,711
1975	20,920	3,627	1,128	1,349	682	468	17,293	1,718	3,403	7,032	5,140
1979	19,330	3,649	1,114	1,275	760	500	15,681	1,555	3,144	6,332	4,650
1981 (Feb.)	20,142	4,430	1,310	1,577	948	595	15,712	1,758	3,272	6,248	4,434
	Employed (Civilian employment in thousands)										
1970	45,473	28,266	1,904	5,230	10,921	10,211	17,207	1,641	4,489	5,372	5,705
1975	52,289	31,319	2,304	6,339	12,891	9,785	20,970	1,941	5,299	7,683	6,047
1979	62,956	36,156	2,475	7,534	15,133	11,014	26,800	2,238	6,358	10,450	7,754
1981 (Feb.)	63,489	35,428	2,082	6,908	15,282	11,156	28,061	1,978	6,309	11,350	8,424
	Unemployed (thousands)										
1970	2,664	1,415	294	478	390	253	1,249	275	386	326	262
1975	5,474	3,041	517	1,059	963	502	2,433	446	769	773	445
1979	4,256	2,098	411	705	659	323	2,158	394	672	716	376
1981 (Feb.)	6,269	3,708	564	1,220	1,306	618	2,561	406	762	920	473
	Unemployment Rate (% of Civilian Labor Force)										
1970	5.5	5.0	13.4	8.4	3.4	2.4	6.8	14.4	7.9	5.7	4.4
1975	11.7	8.8	19.0	14.3	7.0	4.9	10.4	18.7	12.7	9.1	6.9
1979	6.3	5.5	14.2	8.6	4.2	2.9	7.5	15.0	9.6	6.4	4.6
1981 (Feb.)	9.0	9.5	21.3	15.0	7.9	5.5	8.4	17.0	10.8	7.5	5.3

Source: U.S. Bureau of Labor Statistics, Handbook of Labor Statistics, Bulletin 2070 (December 1980); Employment & Earnings (March 1981).

Labor Force Projections

The U.S. Bureau of Labor Statistics has compiled a series of projections, including high, intermediate and low figures, on the size of the U.S. Labor Force for the years 1985 and 1990. Based on different assumptions regarding the possible rate of growth, projections on the size of the male labor force 16 to 44 years of age range from a low figure of 45.1 million by 1990 to a high of 47.7 million.

Following the trend in population growth by age, the fastest growth in the next few years, particularly among women, will be in the size of the labor force 35 to 44 years of age, with the 25-34 age group showing the second greatest expansion in numbers.

Projected Growth of the Civilian Labor Force by Sex, 16-44 Years of Age
1985, 1990
(in thousands)

	Actual		Projections					
			High		Intermediate		Low	
Males	1970	1977	1985	1990	1985	1990	1985	1990
16 - 44 years old	31,490	38,368	4,522	47,711	44,608	46,150	43,891	45,106
16 - 19	4,006	4,985	4,589	4,587	4,374	4,199	4,225	4,007
20 - 24	5,709	7,877	8,293	7,292	8,091	6,957	7,909	6,737
25 - 34	11,311	14,887	18,244	18,914	17,925	18,401	17,649	17,967
35 - 44	10,464	10,619	14,396	16,918	14,218	16,593	14,108	16,395
Females								
16 - 44 years old	19,780	27,823	39,220	43,603	37,620	41,108	35,976	38,808
16 - 19	3,241	4,267	4,457	4,546	4,192	4,139	3,887	3,749
20 - 24	4,874	6,556	8,053	7,508	7,742	7,086	7,428	6,626
25 - 34	5,698	9,848	15,190	16,938	14,607	16,063	13,873	15,087
35 - 44	5,967	7,152	11,520	14,611	11,079	13,820	10,788	13,346

Projected Percentage Change, 1985/1977, 1990/1977

	High		Intermediate		Low	
Males	1985/77	1990/77	1985/77	1990/77	1985/77	1990/77
16 - 44 years old	+ 18.6%	+ 24.3%	+ 16.3%	+ 20.3%	+ 14.4%	+ 17.6%
16 - 19	- 7.9	- 8.0	- 12.2	- 15.8	- 15.2	- 19.6
20 - 24	+ 5.3	- 7.4	+ 2.7	- 11.7	+ 0.4	- 14.5
25 - 34	+ 22.5	+ 27.0	+ 20.4	+ 23.6	+ 18.5	+ 20.7
35 - 44	+ 35.6	+ 59.3	+ 33.9	+ 56.3	+ 32.8	+ 54.4
Females						
16 - 44 years old	+ 41.0	+ 56.7	+ 35.2	+ 47.7	+ 29.3	+ 39.5
16 - 19	+ 4.4	+ 6.5	- 1.8	- 3.0	- 8.9	- 12.1
20 - 24	+ 22.8	+ 14.5	+ 18.1	+ 8.1	+ 13.3	+ 1.1
25 - 34	+ 54.2	+ 72.0	+ 48.3	+ 63.1	+ 40.9	+ 53.2
35 - 44	+ 61.1	+104.3	+ 54.9	+ 93.2	+ 50.9	+ 86.6

Source: Based on U.S. Bureau of Labor Statistics projections, Handbook of Labor Statistics (Bulletin 2070), December 1980.

Women in the Labor Force

The rapid growth in the participation rate of females in the U.S. labor force has been one of the most important economic and social developments of our times. The ratio is expected to increase during the 1980's, but at a somewhat slower pace. Since the upcoming generation of women is much better educated and its members have quite different professional capacities and expectations than in the past, a higher proportion of total personal income may represent the earnings of women in the future.

Women's Labor Force Participation Rate
1950-1980 by Age 18-44
(Percent of Population in Labor Force)

Age	1950	1960	1970	1979	1980
18 - 19	51.3	50.9	53.6	62.9	62.3
20 - 24	46.0	46.1	57.7	69.1	69.2
25 - 34	34.0	36.0	45.0	63.8	65.5
35 - 44	39.1	43.4	51.1	63.6	65.5

Among women 25-34 years of age who were single (never married) in 1979, 83.2% were in the labor force compared with 57% of women of this age who were living with their husbands.

Labor Force Participation Rates of Women 16 - 44 Years of Age
By Marital Status, 1979
(Percent of Population in Labor Force)

	All Women in Specified Age Groups	Never Married	Married, Husband Present	Married, Husband Absent	Divorced	Widowed
Total 16 & over	50.7	62.7	49.4	58.8	74.0	22.6
Selected age groups:						
16 - 19	50.9	50.7	51.2	54.1	*	*
20 - 24	68.7	74.6	61.2	64.3	85.8	*
25 - 34	63.5	83.2	57.0	65.5	81.7	54.4
35 - 44	63.6	77.1	60.3	63.2	82.7	52.9

*Rate not shown as base is less than 75,000.

Source: U.S. Bureau of Labor Statistics, *Perspectives on Working Women: A Databook*, Bulletin 2080 (October 1980).

As to the future course of labor force participation among women, the U.S. Bureau of Labor Statistics points out that the economic climate which supported the strong growth in the 1970's is changing, and there are already indications that the growth in women's labor force participation may be slowing, perhaps temporarily.

(continued)

Women in the Labor Force (continued)

The slowdown may not hit all age groups, however. Women 25-34 accounted for more than half the increase in the number of female workers during 1980. While these young women have been at the forefront of female labor force gains in the past decade, this growth was substantially greater than for most previous years. In 1980, 65% of women 25 to 34 were working or looking for work in 1980, including 57% of the mothers in these age groups.

Employment by Occupation

The U.S. Bureau of Labor Statistics has made an analysis of employment by age and by sex in terms of major occupational groups. Among males age 20-24, the largest percentage were in blue collar occupations, with craft workers (such as carpenters, mechanics, construction workers, etc.), accounting for 21.4% of employment in this age group in 1980. Operatives (except transport) accounted for 16.3% of the 20-24 males employed in 1980.

Among males 25-34, again the largest group were craft workers (22.4%); however, over 19% were classified as professional/technical workers (doctors, health workers, teachers, lawyers, etc.); 13.3% were managers or administrators. Comparable figures for the 35-44 year old males were 22.4%, 18.9% and 18.6%, respectively.

The pattern among women 18-44 years of age is quite different. The largest concentration was in clerical work (secretaries, typists, other clerical workers), with the figures ranging from 42.4% of employed women 20-24 years of age down to 33.8% of women 35-44. The professional/technical group included 14.2% of working women 20-24, 23.7% of those age 25-34, 19.2% of women age 35-44.

(continued)

Employment by Occupation (continued)

Employed Persons Age 18-44, by Sex, in 1980
(Numbers in thousands)

Men	Total	18-19	20-24	25-34	35-44
Total employed	36,030	2,384	7,264	15,230	11,152
White collar workers	14,960	440	2,214	6,874	5,432
Professional/technical	5,919	74	787	2,946	2,112
Managers/administrators (except farm)	4,584	52	424	2,031	2,077
Sales workers	2,119	119	389	941	670
Retail	755	97	222	288	148
Other	1,363	22	167	653	521
Clerical/office	2,338	195	614	956	573
Blue collar corkers	17,054	1,396	4,045	6,909	4,704
Craft workers (carpenters, mechanics, etc.)	7,850	382	1,554	3,413	2,501
Operatives, except transport	4,408	396	1,184	1,750	1,078
Transport equipment operatives	2,134	125	470	879	660
Nonfarm laborers	2,662	493	837	867	465
Service workers	2,943	436	765	1,061	681
Farm workers					
Managers	524	11	72	218	223
Laborers	550	102	168	168	112
Women					
Total employed	27,680	2,188	6,359	10,991	8,142
White collar workers	18,859	1,276	4,293	7,849	5,441
Professional/technical	5,153	77	905	2,609	1,562
Managers/administrators	1,783	46	298	787	652
Sales workers	1,689	244	403	567	475
Retail	1,152	224	312	330	286
Other	537	20	91	237	189
Clerical/office	10,234	909	2,687	3,886	2,752
Blue collar workers	3,744	267	828	1,420	1,229
Service workers	4,813	622	1,195	1,632	1,364
Farm & other workers	264	23	43	90	108

Source: U.S. Bureau of Labor Statistics, Current Population Survey.

INCOME

Households

As noted in the data on population growth, an extensive shift is underway in the income/age composition of the population, with the most rapid growth developing in the 25-44 age group. According to The Conference Board, while average household income is below average among homes headed by persons under 35, for the 35-44 age group it is about a fourth above par, and is almost 15% higher than among households with heads 55-64 years old.

The Conference Board points out that although households with heads 35-44 years old have a higher overall average income than the older group, they are in the prime years of the life cycle and at maximum size, with the result that on a per capita basis income among these households averages less than among the older group. This is a factor marketers might want to consider.

Nevertheless, the highest per capita income is found among households headed by men who are single—either never married or divorced, who tend to fall in the young adult classification. Per capita income for this group runs some 45% above the average for all households. However, this segment accounts for only 12.6% of all households and less than 7% of all persons.

By comparison, women living without husbands do not fare nearly so well. They represent almost 26% of the nation's households, and 18% of the population, including a higher percentage of older women than noted for single men. Household income for the group averages slightly more than half of the all-household average.

Young Households by Selected Characteristics, 1978

Age of Head	% of U.S. Total			Average Household Size	Average Income Index U.S. Total=100	
	Households	Persons	Income		Households	Per Capita
Up to 44 years	47.4%	53.9%	48.9%	--	--	--
Under 25	8.2	6.6	5.6	2.24	68.6	85.3
25 - 34	22.0	23.6	21.9	2.99	99.9	92.9
35 - 44	17.2	23.7	21.4	3.83	124.2	90.4

Source: The Conference Board, Across The Board (June 1980).

The Conference Board defines households that have "discretionary" or surplus income as those with incomes of $35,000 or more. The amount of supernumerary income is defined as a household's total pretax income, less $35,000. What is left over represents a market for luxury and near-luxury services and products.

During the past decade the number of homes with earnings over $35,000 (measured in constant 1980 dollars) grew some 50%, and The Conference Board estimates that in the 1980's households with that income (1980 dollars) will increase by about three-fifths, or about three times as fast as the population. This income class—$35,000 plus—is largely middle-aged, but more than 25% are households headed by persons 35-44. Households headed by persons under 35 represent less than 17% of the supernumerary income group.

(continued)

INCOME

Households (continued)

Of all households (including families and unrelated individuals living alone or together) in the U.S., 25.6% had incomes of $25,000 or more in 1979, up from 20.7% in 1978, according to the Census Bureau. Inflation is, of course, a factor in the increase; however, another important factor is the ever-growing number of double income families, where both husband and wife work full-time. Moreover, a steadily growing number of women are now entering professions rather than "jobs," with higher earning power. The number of women employed in jobs classified as "professional-technical" by the U.S. Bureau of Labor Statistics increased by 42.5% from 1970 to 1979, with the total growing from 4,576,000 to 6,519,000 women. The impact of this development is primarily in the young household market.

Earnings of married women living with husbands contributed a median 26.1% of total family income in 1978. In families with husbands under 25 years, wives' earnings contributed a median 30.0%; in the 25-44 age group, the contribution of wives showed a median 26.9%.

According to the Conference Board, almost half of the families in which both husband and wife work have heads of households who are under 35 years of age, but they will soon be moving into the 35-44 age bracket, which the Board calls "by far the most promising sector of the market—for goods and services required for everyday needs as well as for luxury and top-of-the-price line products generally." As of 1980, it was estimated that about 33% of the families in this age group had annual incomes exceeding $25,000, and that share could read 47% by 1990.

The latest available data on incomes by age of household head are from the Census Bureau, as summarized below for the 18-44 group.

Distribution of U.S. Households 18-44, by Income, 1978

	Total, Families & Unrelated Individuals 18-44	Family Total 18-44	Families (by age of head, 18-44)					
			With Male Head			With Female Head		
			18-24	25-34	35-44	18-24	25-34	35-44
Number (thous.)	40,479	29,017	3,008	11,350	9,903	777	2,128	1,851
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Income:								
Under $10,000	31.3	22.0	27.9	12.3	9.6	89.3	71.5	52.5
$10-$14,999	18.6	17.1	28.5	18.0	12.3	5.2	17.4	23.3
$15-$24,999	31.0	36.0	36.1	45.0	37.2	3.5	9.3	18.8
$25,000 & over	19.1	24.9	7.5	24.7	40.9	1.9	1.8	5.4
Median income			$13,820	$19,005	$20,479	$3,997	$6,570	$9,477

(continued)

Households (continued)

Distribution of U.S. Households 18-44, by Income, 1978 (continued)

	Unrelated Individuals (by age, 18-44)						
	Total	Male			Female		
	18-44	18-24	25-34	35-44	18-24	25-34	35-44
Number (thous.)	11,462	2,318	3,131	1,316	2,094	1,850	753
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Income:							
Under $10,000	55.0	70.2	38.7	32.9	81.4	51.3	50.5
$10-$15,999	22.5	19.2	25.8	18.8	15.2	31.6	23.2
$15-$24,999	18.0	9.8	29.0	32.1	3.3	15.0	21.2
$25,000 & over	4.5	0.8	6.5	16.3	0.1	2.1	5.1
Median income		$7,003	$11,872	$14,394	$9,008	$11,222	$12,384

Source: U.S. Bureau of the Census, Current Population Reports, Series P-60, No. 123 (June 1980).

Households in the 25-44 group with incomes of $25,000 or more numbered 5,980,000 in 1978, representing 43.3% of all households with incomes of $25,000 and up, or 7.9% of total households. The 25-44 upper-income group controlled about 17% of total aggregate money income in 1978, according to Census Bureau data. The Conference Board has estimated that this group will account for some 30% of aggregate consumer income by 1990, up from slightly more than an estimated 20% at the beginning of the decade.

Aggregate Income of U.S. Households by Age of Householder, 18-44
(Households as of March 1978. Income in 1977 Dollars)

	Total All Households (all ages)	Families/Non-Family Hshds.Tot. 14-44	Total	Family Households (by age of head) 14-24	25-34	35-44
Number (thous.)	76,030	36,019	28,582	3,759	13,323	11,500
Aggregate income (bils.)	$1,224.1	$597.7	$505.6	$42.4	$224.6	$238.6
Households with income $25,000 or more						
Number (thous.)	13,800	6,163	5,596	119	2,154	3,323
Aggregate income (bils.)	$ 505.1	$235.9	$215.3	$25.0	$ 70.3	$120.0
% of total:						
Households	18.1%	17.1%	19.6%	3.2%	16.2%	28.9%
Aggregate income	41.3%	39.5%	42.6%	59.0%	31.3%	50.3%

(continued)

Households (continued)

Aggregate Income of U.S. Households by Age of Householder, 18-44
(Households as of March 1978. Income in 1977 Dollars)

	Non-family Households (by age) Total	14-24	25-34	35-44
Number (thous.)	7,437	2,460	3,508	1,469
Aggregate income (bils.)	$92.1	$22.9	$47.1	$22.1
Households with income $25,000 or more				
Number (thous.)	567	64	309	194
Aggregate income (bils.)	$20.6	$ 2.0	$10.7	$ 7.9
% of total:				
Households	7.6%	2.6%	8.8%	13.2%
Aggregate income	22.4%	8.7%	22.7%	35.7%

Source: U.S. Bureau of the Census, Current Population Reports, Series P-60, No. 122 (March 1980).

Singles/Unrelated Households

The Conference Board has made an analysis of the "singles" market which is broader than that encompassing only those who live alone or with unrelated individuals. Included in this definition are all individuals over age 20 but under 35 who are still living in their parental home—including a considerable number who have been forced by inflation to move back to parent's homes—as well as those living alone or in households consisting of only two individuals.

According to this definition, the singles market included something over 25 million persons in 1978, representing a fourth of the U.S. total adult population. About 35% of these singles lived with parents, according to the Board. Some three-fourths were between the ages of 20 and 24; three out of five were men. Incomes of over $25,000 were reported for 14.2% of singles age 25-34 on a household income basis—with most of these involving two earners.

(continued)

INCOME

Singles/Unrelated Households (continued)

The "Singles" Household Market By Age & Income Class-1978*

	Households (000,000)	Percent Distribution							Average Income ($)
		Under $4,000	$4,000-7,000	$ 7,000-10,000	$10,000 15,000	$15,000-20,000	$20,000-25,000	Over $25,000	
All U.S. Households	76.0%	12.3%	12.7%	11.7%	18.0%	15.6%	11.5%	18.2%	$16,100
Total "singles"	10.7	11.3	12.6	15.9	24.3	16.2	10.1	9.6	13,437
Head under 25	4.1	18.1	18.6	18.6	23.1	13.2	6.0	2.4	10,097
25-34	6.6	7.1	8.7	14.2	25.1	18.0	12.7	14.2	15,533
One-person households	4.3	15.8	18.3	21.1	27.3	11.5	3.1	2.9	10,016
Head under 25	1.6	25.9	26.4	23.4	18.7	4.3	.7	.6	7,184
25-34	2.7	9.7	13.4	19.8	32.4	15.8	4.6	4.3	11,708
Two-person households	6.4	8.3	8.7	12.4	22.3	19.3	14.8	14.2	15,728
Head under 25	2.5	3.1	13.7	15.5	25.9	18.9	9.4	3.5	11,952
25-34	3.9	5.2	5.5	10.4	20.0	19.5	18.3	21.1	18,175

*Data are based on households as of 1978, income for previous year.

Source: The Conference Board, Across The Board,
June 1979.

Personal

Income of individuals in the 20-44 age group is analyzed in the following table. This covers money received from all sources, including earnings, dividends, interest, etc. Of men age 20-44, 13.6% had incomes of $25,000 and over in 1979; the comparable figure for women was 1.0%.

Only 18% of men in the 35-44 age group had incomes under $10,000 compared with 63.4% of the women.

(continued)

INCOME

Personal (continued)

Persons 20-44 Years Old by Total Money Income in 1979, by Sex
(Population as of March 1980)
(Number in thousands)

	Total, 20-44 (Men & Women)		Men (Age 20-44 Years)							
			Total		20-24		25-34		35-44	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total	80,651	100.0%	39,445	100.0%	9,802	100.0%	17,347	100.0%	12,296	100.0%
Without income	4,649	5.8	745	1.9	425	4.3	221	1.3	99	0.8
With income	76,002	94.2	38,700	98.1	9,377	95.7	17,126	98.7	12,197	99.2
Income:										
Under $10,000	40,290	50.0	12,660	32.1	5,884	60.0	4,559	26.3	2,117	18.0
$10,000-$14,999	14,643	18.2	8,411	21.3	2,159	22.0	4,141	23.9	2,111	17.2
$15,000-$24,999	15,259	18.9	12,255	31.1	1,202	12.3	6,346	36.6	4,707	38.3
$25,000-$34,999	3,860	4.8	3,561	9.0	95	1.0	1,546	8.9	1,920	15.6
$35,000-$49,999	1,223	1.5	1,133	2.9	20	0.2	364	2.1	749	6.1
$50,000 & over	728	0.9	684	1.7	18	0.2	172	1.0	494	4.0
Median income					$7,796		$14,814		$18,437	

	Women (Age 20-44 Years)							
Total	41,206	100.0%	10,246	100.0%	17,918	100.0%	13,042	100.0%
Without income	3,904	9.5	931	9.1	1,636	9.1	1,337	10.3
With income	37,302	90.5	9,315	90.9	16,282	90.9	11,705	89.7
Income:								
Under $10,000	27,630	67.0	8,028	78.3	11,333	63.2	8,269	63.4
$10,000-$14,999	6,232	15.1	1,059	10.3	3,169	17.7	2,004	15.4
$15,000-$24,999	3,004	7.3	199	1.9	1,609	9.0	1,196	9.2
$25,000-$34,999	299	0.7	15	0.2	121	0.7	163	1.2
$35,000-$49,999	90	0.2	9	0.2	39	0.3	42	0.3
$50,000 & over	44	0.1	6		9		29	0.2
Median income			$4,796		$6,362		$5,888	

Source: U.S. Bureau of the Census, Current Population Reports, Consumer Income, Series P-60, No. 125 (Oct. 1980-Advance Report).

SPENDING PATTERNS

As the U.S. population in terms of age groups is undergoing a shift in emphasis, the shrinking youth market and the growing importance of young adults (as well as of older Americans) is undergoing many changes in marketing strategies and product development.

Intangible divisions within adult age groups are expected to soften, if not disappear in the next two decades, according to some observers, and manufacturers and retailers may pay less attention to age and more attention to attitudes.

(continued)

SPENDING PATTERNS

The changing lifestyles of young adults, including the growing number of divorced people and singles who are setting up homes, has been a major factor in some market shifts and product emphasis. Such products as microwave ovens, specialty cars and home entertainment items are among the products that have benefited from the changing patterns in lifestyles.

However, some of the optimism based on the free-spending reputation of the young singles and of the two-income young households has had to be tempered in view of the realities of reduced real incomes, high gasoline prices, inflation, rising housing costs.

For example, the fast-growth in this segment of the population was credited with the sharp rise in restaurant business in recent years. Dining out appeared to be a necessary habit among the young single adults and young husband/wife families with two earners, and was expected to push restaurant's share of total spending for food beyond the peak of 38% reached in 1978, up to 50% by the end of the decade. However, for the last two years restaurants' share of the food dollar has been declining for the first time since World War II.

Most of the young adult population 25 to 34 years of age are married and living with their spouses. This group's members pass through two significant stages of life—household formation at one end, home ownership at the other. Thus, the market among husband/wife family groups is a highly segmented one.

An analysis of government data on consumer expenditures made by Sales & Marketing Management Magazine (July 24, 1978) showed the following on expenditures by households with 25-34-year-old heads as a ratio of typical household spending:

Category	Ratio
Food	74.3%
Alcoholic beverages	125.7
Tobacco	108.9
Housing	131.8
Household furniture, equipment	127.8
Clothing	110.8
Transportation	106.1
Health care	82.7
Personal care	89.8
Recreation	106.9
Reading	116.4
Education	55.6

The Conference Board has made analyses of the singles household market, defined as covering young adults who either live alone or with unrelated individuals. It was estimated that in 1979 this group accounted for roughly $150 billion, or one out of eight dollars, of total consumer spending for goods and services. As in data on spending patterns in the young adult husband/wife families, data on the patterns among singles also showed appreciable differences in spending habits by the various segments of that market.

(continued)

SPENDING PATTERNS

Among one-person households under 25 years of age, outlays for clothing take a less-than-average share of the total budget; and for health and personal care products, a considerably smaller share. On the other hand, spending for shelter is far above the all-country norm. But since less furniture and fewer home furnishings in general are required, spending for such items fall below the average.

Income has increased among the singles 25-34 years of age, and they are found to spend more than younger singles on food, particularly eating out, and on clothing; also on recreation and travel.

Spending Patterns Among One- & Two-Person Households
20-34 Years of Age

	Total U.S. House-holds	Singles					Singles Expenditures as Percent Total U.S.
		Total	1-person househld.		2-person househld.		
			Under 25	25-34	Under 25	25-34	
Total U.S. expenditures	100.0%	12.4	1.2	2.7	2.9	5.6	12.4%
Distribution expenditure	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Food	21.3	14.4	11.8	15.0	13.9	14.8	
At home	16.4	8.2	5.7	6.8	8.3	9.2	6.1
Away from home	4.6	5.8	5.4	7.7	5.2	5.4	15.5
Alcoholic beverages	0.9	1.5	2.0	2.8	0.9	1.1	20.0
Tobacco products	1.6	1.5	1.7	1.7	1.4	1.5	11.9
Housing	30.2	34.7	35.2	34.4	34.3	34.9	14.2
Shelter	16.5	22.8	26.4	25.0	22.4	21.3	17.2
Rented dwellings	7.2	19.0	25.9	23.4	20.2	15.1	33.0
Owned dwellings	9.0	3.7	0.4	1.5	2.1	6.1	5.0
Fuel, utilities	5.1	3.0	2.3	2.4	3.1	3.3	7.2
Housing expenses	3.8	3.4	2.7	3.1	3.1	3.7	11.0
House furnishings & equipment	4.8	5.6	3.8	4.0	5.6	6.6	14.1
Clothing	8.1	8.6	7.3	8.5	8.2	9.2	13.1
Male	2.7	2.8	2.5	3.0	2.5	2.8	12.6
Female	3.9	3.9	2.7	3.2	3.9	4.4	12.4
Clothing care, etc.	1.5	2.0	2.2	2.3	1.8	1.9	16.0
Transportation	19.8	22.5	28.1	20.5	25.4	20.7	14.0
Vehicle purchases & finance charges	9.8	12.2	16.4	10.9	14.4	10.9	15.4
Vehicle operations	9.3	9.4	10.8	8.7	10.3	9.1	12.6
Health & personal care	7.3	4.5	3.1	4.0	4.1	5.2	7.7
Recreation	8.0	9.6	9.0	10.3	9.2	10.0	15.2
Vacation trips	3.1	3.4	2.4	3.8	2.6	3.8	13.3
Other*	4.9	6.4	6.6	6.5	6.6	6.2	16.2
All other	2.8	2.5	1.8	2.8	2.6	2.6	11.2

*Includes owned vacation homes, televisions, boats, aircraft, wheeled goods and other.
Note: Distribution of expenditures based on United States Department of Labor Consumer Survey, 1972-73. Subitems do not always add up to the major category total because of minor items not shown separately.

Source: The Conference Board, Across the Board,
July 1979.

SPENDING PATTERNS

In 1977 a study of the purchasing patterns of households with annual incomes of $20,000 or more was conducted for Ziff-Davis Publishing Co. by Yankelovich, Skelly & White.

According to this survey, there were substantial behavioral differences in the purchasing decision process of young adult (18-34) consumers compared with older groups in regard to big ticket items. The younger customers are more apt to be first time buyers, shop more carefully and take longer to make up their minds than the older customers. Younger customers are also more price conscious and are more likely to seek advice and consult advertising.

College Students

There has been a marked change in the attitudes and outlook of the young population 18 to 24 years old in recent years. As pointed out in Men's Wear Magazine (April 13, 1981), the young men's market is strikingly different today than in the 1960's and 1970's when it was groping for identity and spent excessively to look different. Today there is concern for the high cost of living and the need to work and make money. Tastes have become much more conservative and young adults feel the need to dress up under the competitive pressures in the job market.

The fact that so many students are also in the labor force has had considerable impact on apparel buying habits, and other purchasing decisions. As noted in the section on school enrollment, 46.6% of the 18-19 male population and 23.3% of the 20-24 male population are enrolled in school. About half of those in school are also in the labor force—either working or looking for jobs.

Among women age 18-24, 27% are enrolled in school, and 52% of these students are in the labor force.

The balance of the male and female population 18-24, who are not students, are employed or looking for work.

A 1980 survey of the college market by Monroe Mendelsohn was said to be the most comprehensive national study ever undertaken on the purchasing habits of full-time undergraduate college students, most of which were 18 to 23 years of age. The study was designed to obtain information on ownership or usage of specific products, travel by air, and credit cards, as well as publication readership, TV viewing and demographic information.

Data were obtained from mailings made in April and May 1980 to 6,029 students in 140 institutions, and completed questionnaires were received from 4,196 students.

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store type.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (August): Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS (June): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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Women's Inner Fashions: Nightwear, Daywear and Loungewear

FACT FILE

Market Research Division
Fairchild Publications, New York

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Women's Inner Fashions: Nightwear, Daywear and Loungewear

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WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR & LOUNGEWEAR

Market Trends

The women's inner fashion industry, affected by the recession like all other aspects of women's apparel, is beginning to pick up, though somewhat subservient to the dictates of outerwear fashions. The intimate apparel companies are now aggressively seeking new, younger customers as well as maintaining older, more traditional customers, and upscaling their lines.

Preliminary 1980 production data from the National Cotton Council of America indicate a slight (1.5%) increase in women's intimate apparel compared to 1979. This increase follows a 4.9% decline in cuttings in 1979 versus 1978. The International Ladies Garment Workers Union reported in their Conditions In The Women's Garment Industry (June 16, 1981) that intimate apparel production was "sluggish" in the first part of 1981, though sleepwear seemed to do somewhat better than daywear and foundations.

Nightwear, according to industry analysts, is the major area of growth in the industry in 1981 for several reasons. Primarily, the introduction of "transitional" items, which increase the selling period for these garments well into the winter rather than the traditional shorter period of Thanksgiving to Christmas, has increased sales. These same sources also report that fabric diversification and a ready-to-wear orientation have aided sales. It is also believed that loungewear, which traditionally lags behind sleepwear, can be successfully promoted if the merchandise is modified in the same manner as noted in sleepwear.

In the innerwear segment, longer and fuller petticoats are making their appearance, in line with changing hemlines. Sales of "sports bras," the booming category over the last several years, have leveled off and are remaining rather stable. Panty sales are on the rise and analysts see several factors contributing to this, including improved presentation in stores, a tendency of stores to provide independent funding for the area, a surge in the growth of the branded business and the increasing popularity of natural fiber fabrics.

Imports continue to make gains in innerwear, registering a 13.7% gain in units and an 18.6% rise in dollars in 1980 versus 1979. A recent report by the Department of Commerce (Daily News Record, June 12, 1981) indicated that at the present time imports of nightwear are running at over 32% of production, with Taiwan claiming nearly 9% of these imports. To combat this sudden and potentially disruptive surge, the Reagan Administration has temporarily suspended export authorizations for all cotton nightwear from Taiwan. At the same time, the U.S. is also seeking a ban on imports of man-made fiber bras from South Korea for the same reasons. (WWD Aug. 7, 1981). It is reported that imports of Korean bras are up 18% for the first six months of this year compared to 1980, or from 137,364 dozen to 162,514 dozen.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The 1978 Annual Survey of Manufactures, compiled by the U.S. Census Bureau, covers the latest available industry information on women's inner fashions at the industry level. The ASM is based on a sample of manufacturers and is conducted in interim years, between the complete census of manufactures which is conducted every five years. The 1978 ASM data are adjusted for comparability with the latest census report (1977).

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Data on the women's inner garments, daywear and nightwear industries as classified in Census Bureau reports, are summarized in the following tables.

Value of shipments and miscellaneous receipts of manufacturers classified in the robes and dressing gown industry reached $373 million in 1978, a 27.3% increase over 1977. Knit underwear mill shipments increased a respectable 15.2% to $747.6 million. (The previous figures for robes and dressing gowns include garments for women and men while the knit underwear data includes garments for women, men, children and infants). Shipments of women's, misses', children's and infants' underwear and nightwear increased 10.4% to $1.97 billion while brassiere, girdle and allied garments were up 6.1% to $689.8 million.

Women's, Misses', Children's & Infants' Underwear & Nightwear (SIC 2341*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	548	609	--	-10.0%
Number of establishments, total**	638#	698	731	- 8.6%	- 4.5
Employees, total (thous.)	72.6	72.9	77.5	- 0.4	- 5.9
Production workers (thous.)	63.0	63.4	68.7	- 0.6	- 7.7
Payroll (mil. $)	$ 514.6	$ 472.1	$ 372.0	+ 9.0	+26.9
Value added by manufacture (mil. $)##	1,042.9	915.3	790.0	+13.9	+15.9
Value of industry shipments (mil.$) ###	1,966.6	1,780.8	1,331.9	+10.4	+33.7
Capital expenditures, new (mil. $)	21.8	18.7	19.3	+16.6	- 3.1

Brassieres, Girdles & Allied Products (SIC 2342*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	150	220	--	-31.8%
Number of establishments, total**	169#	180	272	- 6.1%	-33.8
Employees, total (thous.)	18.8	18.9	28.0	- 0.5	-32.5
Production workers (thous.)	15.1	15.2	23.2	- 0.6	-34.5
Payroll (mil. $)	$ 151.9	$ 141.1	$ 152.8	+ 7.6	- 7.7
Value added by manufacture (mil. $)##	358.5	334.4	340.0	+ 7.2	- 1.6
Value of industry shipments (mil. $)###	689.8	650.0	647.0	+ 6.1	+ 0.5
Capital expenditures, new (mil.$)	6.5	4.2	4.6	+54.7	- 8.7

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Knit Underwear Mills (SIC 2254*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	80	74	--	+ 8.1%
Number of establishments, total**	96#	92	87	+ 4.3	+ 5.7
Employees, total (thous.)	27.5	25.2	26.0	+ 9.1	- 3.1
Production workers (thous.)	24.9	23.4	23.8	+ 6.4	- 1.7
Payroll (mil. $)	$209.4	$175.2	$134.6	+19.5	+30.2
Value added by manufacture (mil.$)##	409.8	305.7	251.5	+34.1	+21.6
Value of industry shipments (mil.$) ###	747.6	648.9	544.6	+15.2	+19.2
Capital expenditures, new (mil. $)	21.9	14.5	7.0	+51.0	+107.1

Robes & Dressing Gowns (SIC 2384*)

	1978	1977	1972	% Change 1978/1977	% Change 1977/1972
Number of companies	na	136	171	--	-20.5%
Number of establishments, total**	129#	152	179	-15.1%	-15.1
Employees, total (thous.)	10.4	9.6	10.0	+ 8.3	- 4.0
Production workers (thous.)	8.9	8.3	8.5	+ 7.2	- 2.4
Payroll (mil.$)	$ 74.0	$ 65.1	$ 50.0	+13.6	+30.2
Value added by manufacture (mil. $)##	191.9	141.9	92.5	+35.2	+53.4
Value of industry shipments (mil.$)###	373.7	293.6	202.8	+27.3	+44.8
Capital expenditures, new (mil. $)	1.6	3.3	2.0	-51.5	+65.0

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made, as shown below:

SIC 2341 - This industry comprises establishments primarily engaged in manufacturing women's, misses', children's and infants' underwear and nightwear cut and sewed from purchased woven or knit fabric.

SIC 2342 - This industry comprises establishments primarily engaged in manufacturing brassieres, girdles, corsets, corset accessories, and allied garments.

SIC 2254 - This industry comprises establishments primarily engaged in knitting underwear and nightwear from yarn or in manufacturing underwear and nightwear from knit fabric produced in the same establishments. Industry figures include underwear and nightwear for both men and women as well as for children and infants.

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

SIC 2384 - This industry comprises establishments primarily engaged in manufacturing men's and women's robes and dressing gowns.

**Each business location is counted as a separate establishment.

#Covers establishments with paid employees, only, as reported in County Business Patterns.

##Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value of measure of individual industries.

###Value of industry shipments represents the net selling values, f.o.b., plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales).

Source: U.S. Bureau of the Census,
Census of Manufactures, 1972, 1977;
Annual Survey of Manufactures, 1978,
County Business Patterns, 1978.

Employment & Earnings

Current information on employment and earnings in segments of the women's inner fashion industry is published by the U.S. Bureau of Labor Statistics. According to this source all of the innerwear categories measured declined in employment in 1980 compared to 1979. The number of employees in the brassiere and allied garment industry fell the most, 5.9%. However, average weekly earnings of production workers in the three inner fashion industries covered rose during this same period.

In the first three months of 1981, the trend toward lower total employment and higher production worker earnings continued in the women's & children's underwear and brassiere and allied garments industries, when compared to the same 1980 period. The knit underwear segment reversed this trend by registering a 1.6% increase in total employment for the first quarter of 1981 over the first quarter of 1980.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment & Earnings in Selected Women's Inner Fashion Industries

	Jan.-March Avg.			Annual Average		
	1981	1980	% Change 1981/1980	1980	1979	% Change 1980/1979
Knit underwear mills:						
All employees (thous.)	32.3	31.8	+ 1.6%	32.0	32.3	- 0.9%
Production workers (thous.)	28.0	27.6	+ 1.4	27.7	27.9	- 0.7
Average weekly earnings	$176.3	$168.1	+ 4.9	$168.2	$147.2	+14.3
Average weekly hours	36.5	37.2	- 1.9	36.8	36.0	+ 2.2
Average overtime hours	1.2	1.6	-25.0	1.5	1.2	+25.0
Women's & children's underwear:						
All employees (thous.)	70.1	72.4	- 3.2%	72.0	73.3	- 1.8%
Production workers (thous.)	61.0	62.7	- 2.7	62.4	63.3	- 1.4
Average weekly earnings	$158.2	$148.0	+ 6.9	$148.5	$135.7	+ 9.4
Average weekly hours	36.1	36.5	- 1.1	36.3	35.8	+ 1.4
Average overtime hours	1.0	1.1	- 9.1	1.1	1.1	--
Women's brassieres & allied garments:						
All employees (thous.)	17.5	18.1	- 3.3%	17.6	18.7	- 5.9%
Production workers (thous.)	13.7	14.3	- 4.2	13.8	14.9	- 7.4
Average weekly earnings	$165.5	$149.9	+10.4	$151.9	$146.2	+ 3.9
Average weekly hours	35.5	34.4	+ 3.2	34.6	35.4	- 2.3
Average overtime hours	1.0	0.9	+11.1	0.9	0.9	--

Source: U.S. Bureau of Labor Statistics, *Employment & Earnings*.

Concentration in the Industry

Lingerie, loungewear and foundation garment producers are mainly small firms with fewer than 100 employees, which generally represent a very small percentage of total industry employment. Larger firms are mainly to be found in the knit underwear segment, in which 16.7% of the firms have more than 500 employees—up from 1972's 16.1%. These firms employ 65.5% of the workers. In contrast, in the robe and dressing gown segment, 76.7% of the plants had fewer than 100 employees, and these plants accounted for between 32% and 42% of all employment.

In 1980, 94% of total shipments were accounted for by plants with 100 or more employees in the knit underwear mill industry. Brassieres and allied garments and women's and children's underwear had 89% and 87% of their shipments credited to these same plants, respectively. The robe and dressing gown segment showed a significantly lower 69% concentration of shipments from plants with 100 or more employees during the same period.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

The Women's Inner Fashion Industry by Employment Size, 1978

	Establishments		Employees		Annual Payroll	
	Number	%	Number (thous.)	%	Mil. $	%
Women's & children's underwear industry, total	638	100.0%	72.9	100.0%	$528.7	100.0%
By establishment size:						
Under 20 employees	190	29.8	D	--	D	--
20 to 49 employees	117	18.3	3.9	5.3	30.8	5.8
50 to 99 employees	103	16.1	7.7	10.6	52.7	10.0
100 to 249 employees	141	22.1	22.6	31.0	163.1	30.8
250 to 499 employees	69	10.8	24.5	33.6	165.5	31.3
500 or more employees	18	2.8	D	--	D	--
Brassiere & allied garment industry, total	169	100.0	18.6	100.0	$152.3	100.0
By employment size:						
Under 20 employees	44	26.0	D	--	D	--
20 to 49 employees	44	26.0	1.5	8.1	14.1	9.3
50 to 99 employees	27	16.0	2.0	10.8	16.2	10.6
100 to 249 employees	34	20.1	5.1	27.4	36.4	23.9
250 to 499 employees	12	7.1	4.2	22.6	29.2	19.2
500 or more employees	8	4.7	5.3	28.5	52.5	34.5
Knit underwear mills, total	96	100.0	28.7	100.0	$225.2	100.0
By establishment size:						
Under 20 employees	12	12.5	D	--	D	--
20 to 49 employees	14	14.6	0.5	1.7	5.1	2.3
50 to 99 employees	18	18.8	1.3	4.5	9.5	4.2
100 to 249 employees	25	26.1	3.9	13.6	28.2	12.5
250 to 499 employees	11	11.5	D	--	D	--
500 or more employees	16	16.7	18.8	65.5	153.0	67.9
Robes & dressing gowns, total	129	100.0	9.2	100.0	74.2	100.0
By establishment size:						
Under 20 employees	43	33.3	D	--	D	--
20 to 49 employees	32	24.8	1.1	12.0	10.2	13.7
50 to 99 employees	24	18.6	1.8	19.6	12.4	16.7
100 to 249 employees	23	17.8	3.3	35.9	25.2	34.0
250 to 499 employees	6	4.7	2.2	23.9	17.7	23.9
500 or more employees	1	0.8	D	--	D	--

na = not available
D = withheld to avoid disclosure

Source: U.S. Bureau of the Census,
County Business Patterns, 1978.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Concentration in the Industry by Company Size, 1977

	Companies	Plants	Employees	Sales & Receipts (Mil. $)
Women's & children's undergarment manufacturers, total	660	1,002	82,969	$2,159.2
Percent	100.0%	100.0%	100.0%	100.0%
4 largest companies	0.6	9.4	16.9	15.8
8 largest companies	1.2	13.1	23.5	24.3
20 largest companies	3.0	20.0	38.8	39.1
50 largest companies	7.6	31.7	59.6	60.0
Other companies	93.4	68.3	40.4	40.0

Source: U.S. Bureau of the Census,
General Report On Industrial Organization
Enterprise Statistics, 1977.

Operating Ratios

Key Business Ratios in the Women's Inner Fashion Industry, 1980
(Median Results)

	Knit Underwear Mills	Women's & Children's Underwear	Bras & Allied Garments	Robes & Dressing Gowns
Number of manufacturers reporting	18	130	23	41
Current assets to current debt (times)	2.57	1.71	2.56	1.62
Net profits to net sales (percent)	6.79	1.75	1.26	1.85
Net profits to net worth (percent)	27.39	13.43	3.98	18.91
Net sales to net worth (times)	3.44	6.97	3.94	7.39
Net sales to net working cap. (times)	4.25	7.54	4.13	7.33
Average collection period (days)	36	45	52	40
Net sales to inventory (times)	5.5	7.4	4.3	7.7

Source: Dun & Bradstreet, Inc.
Business Economics Division,
1980 Key Business Ratios,
(All Rights Reserved).

By Region

The Middle Atlantic region remains the main area in which women's and children's innerwear plants are located. New York accounted for the major share of plants in 1977 with 36.9% of the total, followed by Pennsylvania and New Jersey with 12.8% and 5.4%, respectively. Combined, these three states contained 619 of the industries 1,122 plants (55.2%).

The leading states in employment were New York, Pennsylvania and Georgia, accounting for 32.5% of the industries 126.6 thousand employees.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

Women's Inner Fashion Industry
By Geographic Region & Leading States, 1977

	Number of Establishments		Employees	
	Total	20 or more Employees	Thousands	% of total**
Knit underwear mills (SIC 2254*)				
Total U.S.	92	74	25.2	100.0%
Middle Atlantic				
New York	14	9	1.0	4.0
Pennsylvania	34	29	4.5	17.9
South Atlantic				
North Carolina	14	10	4.7	18.7
Georgia	3	3	1.0	4.0
East South Central				
Mississippi	4	4	1.4	5.6
Women's & children's underwear (SIC 2341*)				
Total U.S.	698	479	72.9	100.0%
New England				
Massachusetts	22	15	1.9	2.6
Connecticut	10	8	0.4	0.5
Middle Atlantic				
New York	266	132	8.8	12.1
New Jersey	37	21	2.0	2.7
Pennsylvania	83	69	8.2	11.2
North Central				
Indiana	4	4	0.2	0.3
Illinois	8	3	1.0	1.4
South Atlantic				
Virginia	12	11	2.3	3.2
South Carolina	11	11	2.5	3.4
Georgia	25	25	6.5	8.9
South Central				
Mississippi	14	14	3.7	5.1
Arkansas	5	5	0.7	1.0
Texas	13	10	3.0	4.1
Mountain				
Arizona	6	5	1.1	1.5
Pacific				
California	40	20	2.3	3.2

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

Women's Inner Fashion Industry
By Geographic Region & Leading States, 1977 (continued)

	Number of Establishments		Employees	
	Total	20 or more Employees	Thousands	% of total**
Brassieres & allied garments (SIC 2342*)				
Total U.S.	180	116	18.9	100.0%
New England				
Massachusetts	7	3	0.5	2.6
Connecticut	11	8	0.7	3.7
Middle Atlantic				
New York	66	34	3.8	20.1
New Jersey	14	6	1.4	7.4
Pennsylvania	16	13	1.4	7.4
North Central				
Illinois	6	4	0.3	1.6
South Atlantic				
Georgia	8	7	2.5	13.2
South Central				
Texas	8	7	2.0	10.6
Pacific				
California	14	10	1.9	10.1
Robes & dressing gowns (SIC 2384*)				
Total U.S.	152	99	9.6	100.0%
Middle Atlantic				
New York	68	42	3.2	33.3
New Jersey	10	6	na	--
Pennsylvania	11	9	na	--
South Atlantic				
South Carolina	10	10	1.7	17.7
Georgia	5	4	0.3	3.1
Florida	5	4	0.5	5.2

na = not available

*For SIC definition see page 3.

**States with information withheld due to disclosure are not shown therefore percent distribution does not equal 100.0%.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series MC77-1-22B; MC77-1-23C; MC77-1-23D.

PRODUCTION

The latest available official source on production of selected types of women's inner fashions is the Current Industrial Report (CIR) annual report issued by the Census Bureau. The CIR information is based on a sample of apparel manufacturers and thus is not as comprehensive as the 1977 Census of Manufactures. However, the CIR does indicate trends.

Excluded from the CIR surveys are many small apparel firms which are included in the census of manufactures, where data is obtained for these firms from administrative records of other government agencies. These companies accounted for 3.1% of total value of shipments of industries covered by the apparel survey and 1.5% of those covered by the brassiere, corset and allied garment survey.

According to the CIR, total women's innerwear and nightwear production declined by 6.7% from its 1978 level in 1979. The largest production declines were registered by pajamas, except robe sets, down 30.4% and separate bed jackets & peignoirs, except lounge robes, off 21.6% from their 1978 levels.

The only categories to register increases in 1979 were union suits, camisoles, thermal underwear, etc., full-length slips, and half-length slips. Production of these groups rose 37.8%, 5.5% and 2.5%, respectively.

Total production of reported categories of foundation items increased in 1980, up 1.4% although the girdles, corsets, combinations and accessories group continued to decline (-8.4%). This drop in production was offset by the 4.0% increase in production of brassieres in 1980.

Production of Reported Categories of Women's Innerwear & Nightwear, 1979, 1978
(Thousands of Units)

	1979	1978	% Change 1979/1978
Innerwear & Nightwear, total	667,404	715,200	- 6.7%
Women's, misses' & juniors':			
Full-length slips	47,220	44,748	+ 5.5
Half-slips, exc. pettipants	36,096	35,208	+ 2.5
Panties, incl. pettipants	392,424	428,184	- 8.4
Union suits, camisoles, thermal underwear, etc.	21,840	15,852	+37.8
Nightgowns & sleepcoats, exc. sets with robes	98,184	108,024	- 9.1
Pajamas, exc. sets with robes	20,580	29,568	-30.4
Peignoir & robe sets with nightgown or pajamas	21,144	21,480	- 1.6
Separate bedjackets & peignoirs, exc. lounge robes	2,892	3,690	-21.6
Robes, dressing gowns, housecoats, etc.	27,024	28,536	- 5.3

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A (79-1).

PRODUCTION

Production of Reported Categories of Women's Foundation Garments, 1978-1980
(Thousands of Units)

	1980	1979	1978	% Change 1980/1979	% Change 1979/1978
Foundations, total	169,506	167,136	166,632	+ 1.4%	+ 0.3%
Brassieres	141,612	136,176	133,872	+ 4.0	+ 1.7
Girdles, corsets, combinations & accessories	28,344	30,960	32,760	- 8.4	- 5.5

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Brassieres, Girdles, and Allied Garments,
MA-23J(80)-1, MA-23J(79)-1.

Additional information on women's inner fashions and nightwear production is available from the National Cotton Council's Cotton Counts Its Customers. This source covers some items not included in the Census Bureau reports, as well as preliminary figures for 1980.

Production of Women's, Misses' & Juniors' Inner Fashions & Nightwear 1978-1980
(Thousands of Units)

	Production		
	1980(p)	1979(r)	1978(r)
Women's, misses' & juniors:			
Nightwear, incl. bedjackets & robe sets	143,100	142,800	163,032
Knit	94,176	92,712	98,664
Separate bedjackets	1,812	1,872	2,712
Nightgowns & sleepcoats	65,100	62,844	65,352
Pajamas	10,284	10,488	12,912
Peignoir & robe sets with nightgown & pajamas	16,980	17,508	17,688
Woven	49,248	50,088	64,368
Separate bedjackets	984	1,020	1,248
Nightgowns & sleepcoats	35,052	35,340	42,672
Pajamas	9,684	10,092	16,656
Peignoir & robe sets with nightgowns or pajamas	3,528	3,636	3,792
Robes, dressing gowns & housecoats	27,840	27,024	28,536
Knit	11,700	11,184	11,688
Tufted	2,136	2,244	2,364
Woven	14,004	13,596	14,484

(continued)

PRODUCTION

Production of Women's, Misses' & Juniors' Inner Fashions & Nightwear 1978-1980
(Thousands of Units)
(continued)

	Production		
	1980(p)	1979(r)	1978(r)
Underwear	509,616	497,580	523,992
Knit	469,392	452,196	455,556
Panties & pettipants	384,264	370,944	383,976
Petticoats & half-slips	28,116	28,116	26,856
Full-length slips	32,064	31,440	29,772
Vests, camisoles, union suits, etc.	24,948	21,696	14,952
Woven	40,224	45,384	68,436
Panties & pettipants	16,008	21,480	44,208
Petticoats & half-slips	7,980	7,980	8,352
Full-length slips	16,092	15,780	14,976
Vests, camisoles, union suits, etc.	144	144	900

(p) = preliminary
(r) = revised

Source: National Cotton Council of America, *Cotton Counts Its Customers,* 1981 Edition.

By Fabric/Construction

Production of Reported Types of Women's Innerwear & Nightwear By Fabric & Construction, 1978, 1979

	1979	1978	% Change in Units 1979/1978
Full-length slips (thous. of units)	47,220	44,748	+ 5.5%
By Construction:			
Woven fabric	31.7%	32.1%	+ 4.3
Knit fabric	63.3	63.8	+ 4.6
Construction, n.s.k.	5.0	4.1	+ 28.7
By Fabric:			
All cotton & chiefly cotton	10.5	10.6	+ 4.3
All man-made & chiefly man-made	73.3	75.2	+ 2.9
All other fabric	10.1	7.7	+ 38.4
Fabric, n.s.k.	6.1	6.3	+ 2.7
Half-slips, exc. pettipants (thous. of units)	36,096	35,208	+ 2.5
By Construction:			
Woven fabric	18.6%	20.7%	- 7.7
Knit fabric	65.7	66.7	+ 1.0
Construction, n.s.k.	15.7	12.6	+ 27.6
By Fabric:			
All cotton & chiefly cotton	1.3	2.0	- 31.0
All man-made & chiefly man-made	82.7	84.3	+ 0.6
Fabric, n.s.k.	15.9	13.7	+ 19.2

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Types of Women's Innerwear & Nightwear By Fabric & Construction, 1978, 1979

(continued)

	1979	1978	% Change in Units 1979/1978
Panties, inc. pettipants (thous. of units)	392,424	428,184	- 8.4%
By Construction:			
Woven fabric	5.1%	9.4%	- 50.4
Knit fabric	88.0	81.9	- 1.4
Construction, n.s.k.	6.9	8.7	- 27.9
By Fabric:			
All cotton & chiefly cotton	22.5	19.2	+ 7.4
All man-made & chiefly man-made	73.9	71.2	- 4.9
Fabric, n.s.k.	3.6	9.6	- 65.5
Union suits, camisoles, thermal underwear, etc. (thous. of units)	21,840	15,852	+ 37.8
By construction:			
Woven fabric	0.6%	5.3%	- 84.3
Knit fabric	93.7	87.7	+ 47.2
By fabric:			
All cotton & chiefly cotton	25.7	36.2	- 2.1
All man-made & chiefly man-made	51.8	50.2	+ 42.1
All other fabric	4.5	4.1	+ 53.7
Fabric, n.s.k.	18.0	9.5	+159.5
Nightgowns & sleepcoats, exc. sets with robes (thous. of units)	98,184	108,024	- 9.1
By Construction:			
Woven fabric	36.0%	39.5%	- 17.2
Knit fabric	64.0	60.5	- 3.8
By Fabric:			
All cotton & chiefly cotton	12.4	12.5	- 9.9
All man-made & chiefly man-made	87.2	86.9	- 8.8
All other fabric	0.4	6.0	- 35.2
Pajamas, exc. sets with robes (thous. of units)	20,580	29,568	- 30.4
By construction:			
Woven fabric	44.1%	52.2%	- 41.8
Knit fabric	45.8	40.9	- 22.0
Construction, n.s.k.	10.0	6.3	+ 11.0
By Fabric:			
All cotton & chiefly cotton All man-made & chiefly man-made	22.8	19.5	- 18.7
All other fabric	66.5	73.1	- 36.7
Fabric, n.s.k.	10.7	7.3	+ 1.1

(continued)

Production of Reported Types of Women's Innerwear & Nightwear By Fabric & Construction, 1978, 1979

(continued)

	1979	1978	% Change in Units 1979/1978
Peignoir & robe sets with nightgown or pajamas, (thous. of units)	21,144	21,480	- 1.6%
By construction:			
Woven fabric	16.2%	16.9%	- 5.3
Knit fabric	78.2	78.7	- 2.1
Construction, n.s.k.	5.6	4.5	+ 22.5
By fabric:			
All cotton & chiefly cotton	0.8	1.8	- 57.6
All man-made & chiefly man-made	90.7	90.2	- 1.0
All other fabric	3.6	3.5	--
Fabric, n.s.k.	5.4	4.4	+ 21.5
Separate bedjackets and peignoirs, exc. lounge robes (thous. of units)	2,892	3,690	- 21.6
By construction:			
Woven fabric	35.3%	31.5%	- 18.3
Knit fabric	64.7	68.5	- 31.0
By fabric:			
All cotton & chiefly cotton	32.3	25.5	- 7.1
All man-made & chiefly man-made	67.6	74.5	- 33.7
Robes, dressing gowns & housecoats, etc. (thous. of units)	27,024	28,536	- 5.3
By construction:			
Woven fabric	21.1%	26.3%	- 24.0
Knit fabric	26.1	18.3	+ 34.9
Construction, n.s.k.	52.8	55.4	- 9.7
By fabric:			
All cotton & chiefly cotton	5.2	4.5	+ 8.4
All man-made & chiefly man-made	45.0	34.8	+ 22.6
Fabric, n.s.k.	49.8	60.7	- 22.3

n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Apparel MA-23A(79)-1.

PRODUCTION

Materials Consumed in Production

The 1977 Census of Manufactures contains the most complete information available on materials consumed in the manufacture of specified innerwear fashions, as noted below.

Materials Consumed in the Production of Women's Inner Fashions & Nightwear, 1972, 1977

	Delivered Cost (Million $)		% Change
	1977	1972	1977/1972
Knit underwear mills (SIC 2254*)			
Materials, containers & supplies	$325.8	$208.8	+ 56.0%
Knitted fabrics, purchased	7.5	16.4	- 54.3
Carded cotton yarns	94.5	51.5	+ 83.5
Combed cotton yarns	40.7	38.9	+ 4.6
Man-made fiber yarn, filament & spun	34.4	46.4	- 25.9
All other yarns	25.7	14.0	+ 83.6
All other materials, containers & supplies, incl. n.s.k	123.0	41.6	+195.7
Women's & children's underwear (SIC 2341*)			
Materials, containers & supplies	659.8	503.3	+ 31.1
Broad woven fabrics	142.0	111.4	+ 27.5
Purchased knitted fabrics, incl. transfers from other plants of the same company	234.1	248.6	- 5.8
All other materials, containers & supplies including n.s.k.	283.7	143.3	+ 98.0
Brassieres & allied garments (SIC 2342*)			
Materials, containers & supplies	225.1	230.4	- 2.3
Broad woven fabrics	66.9	96.0	- 30.3
Purchased knitted fabrics, incl. transfers from other plants of the same company	87.6	49.7	+ 76.3
All other materials, containers & supplies including n.s.k.	70.6	84.7	- 16.6
Robes & dressing gowns (SIC 2384*)			
Materials, containers & supplies	119.3	77.9	+ 53.1
Broad woven fabrics	77.4	54.1	+ 43.1
Purchased knitted fabrics, incl. transfers from other plants of the same company	20.8	7.1	+193.0
All other materials, containers & supplies including n.s.k.	21.1	16.7	+ 26.3

n.s.k. = not specified by kind
*For SIC definition see page 3.

Source: U.S. Bureau of the Census, Census of Manufactures, Industry Series, MC77-22B; MC77-23C; MC77-1-23D.

SHIPMENTS

Based on a representative sample of manufacturers, the Census Bureau reports that shipments of women's inner fashions, by all producers, including underwear, nightwear, brassieres and loungewear came to $2,347.2 million in 1979, an increase of 16% from the 1978 level of $2,024.3.

Value of Shipments of Reported Women's Inner Fashions, 1978, 1979

	1979 (mil. $)	1978 (mil. $)	% Change of Shipments from 1978
Women's, misses' & juniors' underwear/nightwear	$1,574.0	$1,527.1	+ 3.1
Full-length slips	192.6	169.2	+13.8
Half-slips, exc. pettipants	100.3	88.1	+13.8
Panties, incl. pettipants	297.1	295.2	+ 0.6
Union suits, camisoles & thermal underwear, etc.	59.0	38.3	+54.0
Nightgowns & sleepcoats, exc. sets with robes	456.3	450.7	+ 1.2
Pajamas, exc. sets with robes	92.0	125.0	-26.4
Peignoir & robe sets with nightgown or pajamas	132.3	117.0	+13.1
Separate bedjackets & peignoirs, exc. lounge robes	18.3	20.4	-10.3
Robes, dressing gowns & housecoats, etc.	226.1	223.2	+ 1.3

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel MA-23A(79)-1.

Total shipments of brassieres, girdles and allied garments during 1980 were valued at $829.2 million, compared with 1979 shipments of $773.2 million, an increase of 7.2%. Brassiere shipments were valued at $634.6 million, an increase of 8.6%. Shipments of girdles, corsets and other foundation garments during 1980 were valued at $194.6 million, an increase of 3.2%. Puerto Rican shipments of brassieres increased 10.9%. Puerto Rican shipments of girdles rose from $41.6 million in 1979 to $55.9 million in 1980, an increase of 34.4%.

Value of Shipments of Foundation Garments
1979, 1980

	1980 (mil. $)	1979 (mil. $)	% Change 1980/1979
Brassieres, girdles & allied garments, total	$929.2	$773.2	+20.2%
Domestically produced	527.7	510.0	+ 3.5
Puerto Rican plants	301.5	263.2	+14.6
Brassieres, bandeaux & bra-lettes, total	634.6	584.4	+ 8.6
Domestically produced	389.0	362.8	+ 7.2
Puerto Rican plants	245.6	221.6	+10.8
Girdles and other foundation garments, total	194.6	188.8	+ 3.1
Domestically produced	138.7	147.2	- 5.8
Puerto Rican plants	55.9	41.6	+34.4

Source: U.S. Bureau of the Census, Current Industrial Reports, Brassieres, Girdles, and Allied Garments, MA-23J(80), July 1981.

SHIPMENTS

Unit shipments of women's innerwear by price line and type of garment, based on manufacturers reporting in this detail, are shown below. Since the number of manufacturers supplying the breakdowns by price and style varies from year to year, comparisons must be used with caution, to indicate a general trend rather than a measure of actual gains or losses.

Shipments of Women's Foundation Garments by Factory (Wholesale) Price Line, 1979, 1980

	1980	1979	% Change in Units 1980/1979
Strap bandeaux brassiere, regular (thous. of units)	141,888	141,816	+ 0.1%
Percent:	100.0%	100.0%	--
Under $8.50 per dozen	D	1.8	na
$8.51 to $12.75 per dozen	D	4.4	na
$12.76 to $15.50 per dozen	15.1	14.5	+ 6.6
$15.51 to $19.25 per dozen	6.4	6.4	+ 2.7
$19.26 to $30.00 per dozen	18.7	20.7	- 7.9
$30.01 & over per dozen	52.5	52.2	+ 2.7
Girdles (with opening) incl. latex (thous. of units)	8,880	8,844	+ 0.4
Percent:	100.0%	100.0%	--
Under $36.00 per dozen	25.0	28.5	-11.9
$36.01 to $65.99 per dozen	54.1	44.2	+22.7
$66.00 to $95.99 per dozen	12.6	19.0	-33.6
$96.00 & over per dozen	8.4	8.3	+ 1.6
Girdles (without opening), incl. those made of latex (thous. of units)	35,256	34,224	+ 3.0
Percent:	100.0%	100.0%	--
Under $30.00 per dozen	42.5	47.9	- 8.5
$30.01 to $51.00 per dozen	27.1	20.4	+36.9
$51.01 & over per dozen	30.4	31.7	- 1.4

D = Withheld to avoid disclosure
na = not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Brassieres, Girdles and Allied Garments,
MA-23J(80)-1.

SHIPMENTS

Quantity of Shipments of Women's Foundation Garments by Type, 1979, 1980
(Thousands of Units)

	1980	1979	% Change 1980/1979
Brassieres & allied garments, total	268,044	259,068	+ 3.5%
Brassieres, bra-lettes & bandeaux	219,648	211,932	+ 3.6
Brassieres (with band 3" or more) excl. bra-lettes	7,308	6,804	+ 7.4
Bra-lettes (hip-length with garters), incl. briefers	564	660	-14.5
Bandeaux (with less than 3" bands)	211,776	204,468	+ 3.6
Strap, regular	141,888	141,816	+ 0.1
Strap, padded or contour-lined	57,780	51,228	+12.8
Strapless or convertable	12,108	11,424	+ 6.0
Corsets	96	72	+33.3
Girdles	44,136	43,068	+ 2.5
Girdles (with opening), incl. those made of latex	8,880	8,844	+ 0.4
Girdles (without opening), incl. those made of latex	35,256	34,224	+ 3.0
Combination & one-piece garments (corselets)	2,256	2,736	-17.5
Maternity foundation garments (incl. corselets & combination)	588	600	- 2.0
Garter belts	1,320	1,200	+10.0

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Brassieres, Girdles and Allied Garments
MA-23J(80)-1.

By Leading States

New York State and Pennsylvania each held the largest share of 1977 product shipments in three of the eight categories of women's inner fashions covered by the Census Bureau. The highest share for New York was in the corsets, girdles, combinations and accessories group, where it was responsible for 34.8% of total shipment value while the 31.8% concentration registered by Pennsylvania in the contract work on brassieres, corsets and allied garments was its largest. North Carolina led all states in shipment value of women's and children's knit underwear as Georgia led in the brassieres, bra-lettes and bandeaux segment.

SHIPMENTS

By Leading States (continued)

Value of Shipments of Women's Inner Fashions by Leading States, 1972, 1977

	Value of Shipments (Million $)		% Change 1977/1972
	1977	1972	
Women's & children's knit underwear			
United States, total	$ 95.4	$ 73.0	+ 30.7%
Leading States:			
North Carolina	39.5	na	--
Pennsylvania	23.9	25.9	- 7.7
New York	7.7	na	--
Leading States, total	71.1	--	--
Percent of U.S. total	74.5%	--	--
Women's & children's knit underwear			
United States, total	50.0	45.9	+ 8.9
Leading States			
Pennsylvania	14.1	na	--
Percent of U.S. total	28.2%	--	--
Women's, misses', children's & infants' underwear			
United States, total	585.8	416.7	+ 40.6
Leading States:			
New York	142.1	147.1	- 3.4
Georgia	60.0	38.2	+ 57.1
North Carolina	59.8	53.7	+ 11.4
Pennsylvania	49.7	30.2	+ 64.6
New Jersey	34.4	9.8	+251.0
Mississippi	33.4	24.4	+ 36.9
California	28.1	na	--
Texas	15.0	2.9	+417.2
Oklahoma	12.6	na	--
Illinois	7.2	na	--
Leading States, total	442.3	--	--
Percent of U.S. total	75.5%	--	--
Women's, misses', children's & infants' nightwear			
United States, total	852.2	597.5	+ 42.6
Leading States:			
New York	206.6	164.1	+ 25.9
North Carolina	114.8	67.2	+ 70.8
Pennsylvania	53.7	78.3	- 31.3
South Carolina	49.5	na	--
California	42.4	na	--
Massachusetts	21.6	na	--
Georgia	21.6	17.5	+ 23.4
New Jersey	20.2	22.1	- 8.6
Mississippi	19.9	na	--
Leading States, total	550.3	--	--
Percent of U.S. total	64.6%	--	--

(continued)

SHIPMENTS

By Leading States (continued)

Value of Shipments of Women's Inner Fashions by Leading States, 1972, 1977
(continued)

	Value of Shipments (Million $)		% Change
	1977	1972	1977/1972
Contract work on women's, misses & children's underwear & nightwear			
United States, total	$247.1	na	--
Leading States:			
Pennsylvania	33.4	na	--
North Carolina	31.5	na	--
New York	20.2	na	--
Georgia	12.2	na	--
Virginia	11.0	na	--
Massachusetts	7.4	na	--
New Jersey	3.6	na	--
California	2.3	na	--
Leading States, total	121.6	--	--
Percent of U.S. total	49.2%	--	--
Brassieres, bra-lettes & bandeaux			
United States, total	346.1	385.1	- 10.1%
Leading States:			
Georgia	88.0	na	--
New York	81.9	120.5	- 32.0
California	27.0	na	--
Pennsylvania	4.5	1.1	+309.1
Connecticut	3.7	na	--
Leading States, total	205.1	--	--
Percent to U.S. total	59.3%	--	--
Corsets, girdles, combinations & accessories			
United States, total	153.3	236.7	- 35.2
Leading States:			
New York	53.4	90.6	- 41.1
Pennsylvania	17.0	8.3	+104.8
Connecticut	9.7	9.8	- 1.0
California	8.0	12.7	- 37.0
Texas	7.9	na	--
Leading States, total	96.0	--	--
Percent to U.S. total	62.6%	--	--
Contract work on brassieres, corsets, & allied garments			
United States, total	23.6	na	--
Leading States:			
Pennsylvania	7.5	na	--
Percent to U.S. total	31.8%	--	--

na = not available

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCER PRICE TRENDS

Producer (factory) prices for all women's wear rose an average of 7.0% in 1980 over 1979. Of the specified women's inner fashion and sleepwear items reported, the women's corsets and girdles category was the only one to register a decline, (-15.4%). In the two year period between 1978 and 1980, women's slips increased 21.1% at the wholesale level, more than any other category.

Producer Price Indexes of Selected Types of
Women's Inner Fashions 1978—1980
(1967 = 100 unless specified)

	1980	1979	1978	% Change 1980/1979	% Change 1980/1978
Apparel	172.4	160.4	152.4	+ 7.5%	+13.1%
Women's wear	150.4	140.5	134.0	+ 7.0	+12.2
Brassieres	180.4	168.8	161.9	+ 6.9	+11.4
Corsets & girdles	115.8	136.4	129.7	-15.1	-10.7
Panties**	124.0	113.7	103.7	+ 9.1	+19.6
Slips**	125.2	115.2	103.4	+ 8.7	+21.1
Nightgowns & sleepcoats	133.3	129.4	118.1	+ 3.0	+12.9
Robes, dressing gowns, etc.**	114.1	107.4	101.1*	+ 6.2	+12.9

*June to December Average
**December 1977 = 100

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports

The U.S. imported $237.5 million worth of women's and children's inner fashions and nightwear in 1980, a gain of 18.6% over 1979's total of $200.3 million. Both figures are C.I.F. value (see footnotes on following table), as measured by the Census Bureau. On a quantity measurement, imports of women's inner fashions were 18.1 million dozen. This represents an increase of over 13.7% over the 15.9 million dozen imported in 1979.

U.S. imports of dressing gowns and robes, not knit, rose 65.2% in value ($10.9 million) in 1980 versus 1979. Cotton dressing gowns and robes accounted for most of this increase with an 82.9% gain in import value of $6.4 million versus the 1979 value of $3.5 million.

Imported undergarments, not specified by kind, rose overall 25.1% spurred by a 35.5% rise in the value of knit textile garments.

Only one category of imported women's & children's innerwear and nightwear declined in both a quantity and value basis in 1980 compared to 1979. Non-knit cotton pajama imports were 8.2% in dollar value and 16.3% in unit volume.

(continued)

Imports (continued)

According to the U.S. Department of Commerce, the ratio of nightwear imports to U.S. production is more than 32%. This places this product in the "import sensitive" category.

The top four countries which exported these goods to the United States in 1980 were Mexico, Hong Kong, the Phillipines and the Dominican Republic. These four countries, with $123.5 million worth of exports to the U.S., represented 52% of U.S. imports.

Summary of U.S. Imports of Women's & Children's Innerwear & Nightwear, 1979, 1980

	Quantity (thous. of doz.)		% Change	Value C.I.F.* (mil. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Total, all reported categories	18,074.8	15,902.8	+ 13.7%	$237.5	$200.3	+18.6%
Brassieres, total	12,065.5	11,156.1	+ 8.1	146.3	127.2	+15.0
Cotton	137.4	186.0	- 26.1	1.5	1.8	-16.7
Man-made	11,925.0	10,963.0	+ 8.8	144.7	125.2	+15.6
Textile materials, excl. cotton and man-made	3.1	7.1	- 56.3	0.1	0.2	-50.0
Corsets, garters & other body-supporting garments, total	na	na	--	11.0	8.5	+29.4
Undergarments, n.s.k., total	5,583.5	4,367.8	+ 27.8	60.4	48.3	+25.1
Textile material, not knit	926.7	931.8	- 0.5	29.1	25.2	+15.5
Textile material, knit	4,656.8	3,436.0	+ 35.5	31.3	23.1	+35.5
Pajamas, cotton, not knit, total	232.4	277.8	- 16.3	8.9	9.7	- 8.2
Dressing gowns & robes, not knit, total	193.4	101.1	+ 91.3	10.9	6.6	+65.2
Cotton	135.4	63.3	+113.9	6.4	3.5	+82.9
Wool or Man-made	56.4	36.8	+ 53.3	3.9	2.8	+39.3
Silk	1.6	1.0	+ 60.0	0.6	0.3	+100.0

na = not available
n.s.k. = not specified by kind
* = the C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports,
Report FT 135, December 1979, 1980.

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Innerwear & Nightwear By Leading Countries of Origin, 1979, 1980

	Quantity (thous. of doz.) 1980	Quantity (thous. of doz.) 1979	% Change 1980/1979	Value C.I.F.* (thous. of $) 1980	Value C.I.F.* (thous. of $) 1979	% Change 1980/1979
Brassieres, cotton total	137.4	186.0	- 26.1%	$ 1,502	$ 1,764	- 14.9%
Philippines	82.6	105.5	- 21.7	849	867	- 2.1
Haiti	25.0	16.8	+ 48.8	280	174	+ 60.9
Dominican Republic	19.1	28.0	- 31.8	213	310	- 31.3
Mexico	6.8	8.5	- 20.0	104	137	- 24.1
Brassieres, man-made, total	11,925.0	10,963.0	+ 8.8	144,678	125,155	+ 15.6
Philippines	3,224.8	2,759.8	+ 16.8	28,362	23,042	+ 23.1
Dominican Republic	1,540.9	1,523.6	+ 1.1	20,432	19,772	+ 3.3
Mexico	1,481.7	1,567.9	- 5.5	24,820	23,268	+ 6.7
Costa Rica	1,475.9	1,325.3	+ 11.4	17,494	14,372	+ 21.7
Corsets, garters & other body-supporting garments, total	--	--	--	10,991	8,547	+ 28.6
Mexico	--	--	--	6,275	4,702	+ 33.5
Haiti	--	--	--	1,190	992	+ 20.0
Costa Rica	--	--	--	756	556	+ 36.0
Nicaragua	--	--	--	607	111	+446.8
Knit undergarments, n.s.k., total	4,656.8	3,436.0	+ 25.5	31,255	23,147	+ 35.0
Hong Kong	2,444.4	1,947.9	+ 25.5	10,816	8,586	+ 26.0
Haiti	701.4	362.3	+ 93.6	3,861	2,569	+ 50.3
Mexico	413.3	403.1	+ 2.5	5,107	4,694	+ 8.8
Dominican Republic	232.5	68.8	+237.9	2,681	873	+207.1
Undergarments, not knit, n.s.k., total	926.7	931.8	- 0.5	29,125	25,248	+ 15.4
Hong Kong	327.3	431.3	- 24.1	12,421	14,285	- 13.0
Mainland China	136.6	192.6	- 29.1	3,178	3,268	- 2.8
Sri Lanka	108.3	43.6	+148.4	2,035	795	+156.0
Taiwan	47.9	20.3	+136.0	1,848	531	+248.0
Pajamas, cotton, not knit, total	232.4	277.8	- 16.3	8,890	9,719	- 8.5
Hong Kong	182.6	248.9	- 26.6	6,939	8,593	- 19.2
Taiwan	18.4	4.5	+308.9	697	179	+289.4
Mainland China	16.4	--	--	625	--	--
Nicaragua	9.2	11.6	- 20.7	375	462	- 18.8
Dressing gowns & robes, cotton, not knit, total	135.4	63.3	+113.9	6,362	3,499	+ 81.8
Hong Kong	81.2	35.0	+132.0	3,068	1,419	+116.2
Macao	10.7	2.3	+365.2	374	77	+385.7
Dominican Republic	9.5	--	--	356	--	--
Haiti	6.9	2.5	+176.0	295	82	+259.8

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Innerwear & Nightwear By Leading Countries of Origin, 1979, 1980 (continued)

	Quantity (thous. of doz.)		% Change	Value C.I.F.* (thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Dressing gowns & robes, wool or man-made, total	56.4	36.8	+ 53.3%	$ 3,886	$ 2,768	+ 40.4%
Republic of Korea	12.7	3.8	+234.2	564	146	+286.3
Mainland China	11.9	4.6	+158.7	793	247	+221.1
Hong Kong	9.3	4.1	+126.8	722	616	+ 17.2
Philippines	8.8	4.7	+ 87.2	718	416	+ 72.6
Dressing gowns & robes, silk, total	1.6	1.0	+ 60.0	593	300	+ 97.7
Hong Kong	1.3	0.4	+225.0	406	85	+377.6
Japan	0.2	0.2	--	68	78	- 12.8

*The C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports,
Report FT 135,
December 1979, 1980.

Summary of Imports & Apparent Consumption of Women's Brassieres, Girdles & Allied Garments, 1980
(Quantity in thous. of units; value in mil. $)

	Imports for Consumption		Apparent Consumption*		% Imports to Apparent Consumption	
	Quantity	Value	Quantity	Value	Quantity	Value
Total	169,956	$527.7	na	na	na	na
Brassieres	141,612	389.0	188,484	$502.2	76.5%	36.5%
Girdles, corsets, combinations & accessories	28,344	138.7	32,340	145.7	22.3	8.6

*Apparent Consumption is derived by subtracting exports from total manufacturers' shipments plus imports.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Brassieres, Girdles, and Allied Garments
MA-23J(80)-1.

FOREIGN TRADE

Exports

In 1980, the U.S. exported over 14.2 million dozen of women's & children's innerwear and nightwear valued at $142.4 million. This was a jump of 32.4% over the previous years exports of 10.8 million dozen, valued at $120.2 million.

By far, the largest categorv expected in 1980 in the inner fashion sector was brassieres. This group accounted for 56.8% of the unit volume while representing 49.4% in terms of value.

The largest gain in terms of volume in 1980 was registered by the knit cotton pajamas and other nightwear group which climbed 127.3% to 30 thousand dozen. A close second was knit cotton underwear which captured a 120.7% gain.

The only two categories to register declines on both a unit and value measure were pantyhose, including tights, except cotton and pajamas and other nightwear.

Summary of Exports of Women's & Children's Innerwear & Nightwear 1979, 1980

	Quantity (thous. of doz.)		% Change	Value F.A.S.* (thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Total, all reported categories	14,263.0	10,774.0	+ 32.4%	$142,384	$120,171	+ 18.5%
Brassières, total	8,107.0	5,566.6	+ 45.6	70,289	59,781	+ 17.6
Cotton	889.6	274.9	+223.6	6,982	17,325	- 59.7
Man-made	5,468.1	3,200.0	+ 70.9	50,071	38,464	+ 30.2
Other materials	1,749.3	2,091.7	- 16.4	13,236	13,992	- 5.4
Underwear	3,794.5	2,911.1	+ 30.3	40,060	26,692	+ 50.1
Not knit						
Cotton	453.1	335.0	+ 35.3	2,921	1,345	+117.2
Man-made	537.8	229.0	+134.8	5,138	1,942	+164.6
Other materials	969.4	837.3	+ 15.8	11,020	6,904	+ 59.6
Knit						
Cotton	801.5	363.2	+120.7	6,654	5,108	+ 30.3
Man-made	763.5	926.1	- 17.6	10,116	9,031	+ 12.0
Other materials	269.2	220.5	+ 22.1	4,211	2,362	+ 78.3
Garters, garter belts & suspenders, total	277.5	157.2	+ 76.5	1,441	1,488	- 3.2
Pantyhose, (incl. tights, exc. cotton), total	1,313.6	1,506.5	- 12.8	7,628	8,947	- 14.7
Body supporting garments, exc. brassieres	267.7	158.9	+ 68.5	5,661	5,104	+ 10.9

(continued)

FOREIGN TRADE

Exports (continued)

Summary of Exports of Women's & Children's Innerwear & Nightwear, 1979, 1980

(continued)

	Quantity (thous. of doz.)		% Change	Value F.A.S.* (thous. of $)		% Change
	1980	1979	1980/1979	1980	1979	1980/1979
Pajamas & other nightwear	382.6	386.4	- 1.0%	$ 10,920	$ 13,279	- 17.8%
Not Knit						
Cotton	39.5	43.5	- 9.2	1,317	1,534	- 14.1
Wool	7.5	19.1	- 60.7	470	717	- 34.4
Man-made	113.7	108.4	+ 4.9	3,138	3,806	- 17.6
Other materials	32.8	55.8	- 41.2	1,169	1,485	- 21.3
Knit						
Cotton	30.0	13.2	+127.3	938	502	+ 86.9
Wool	7.1	11.4	- 37.7	240	400	- 40.0
Man-made	117.5	98.9	+ 18.8	3,167	3,463	- 8.5
Other materials	34.5	36.1	- 4.4	1,419	1,372	+ 3.4
Robes & dressing gowns	120.1	87.3	+ 37.6	6,385	4,880	+ 30.8
Not Knit						
Cotton	34.5	38.4	- 10.2	2,087	1,245	+ 67.6
Wool	3.6	2.1	+ 71.4	115	88	+ 30.7
Man-made	82.0	46.8	+ 75.2	4,183	3,547	+ 17.9

*The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of export, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports, FT 410
December 1980, 1979.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

According to the Census Bureau, the number of women in the U.S. 15 years of age and older will grow 16.0% by the year 2000. Women aged 35-44 will increase 61.4% by 2000 to more than 21 million, 19.9% of females 15 and over. The next largest increase is in the 45-54 year old group, which is expected to rise 55.7% to 18.3 million women. During the same time span, women aged 15-34 are expected to decline in numbers with the biggest decrease (21.5%) in the 20-24 year old age bracket.

THE POTENTIAL MARKET

Female Population of the U.S., 1980 & Projections to 2000*
(In Thousands)

	1980	1985	2000	% Change 2000/1980	Percent of Female Population		
					1980	1985	2000
Total, all ages	116,472	119,514	133,790	+ 14.9%	100.0%	100.0%	100.0%
Under 15 years	25,069	25,203	27,785	+ 10.8	21.5	21.1	20.8
15 years & older	91,403	94,311	106,005	+ 16.0	78.5	78.9	79.2
15-19 years	10,410	8,857	9,658	- 7.2	8.9	7.4	7.2
20-24 years	10,652	10,192	8,360	- 21.5	9.1	8.5	6.2
25-34 years	18,698	20,034	17,326	- 7.3	16.1	16.8	12.9
35-44 years	13,063	16,002	21,084	+ 61.4	11.2	13.4	15.8
45-54 years	11,789	11,542	18,356	+ 55.7	10.1	9.7	13.7
55-64 years	11,549	11,390	12,116	+ 4.9	9.9	9.5	9.1
65 years & older	15,242	16,293	19,103	+ 25.3	13.1	13.6	14.3
Median age (in years)	31.3	32.7	36.8				

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census, 1980 Census of Population, Supplementary Reports, PC80-S1-1; Current Population Reports, Series P-25, No. 714 (July 1977).

RETAIL SALES BY STORE TYPE

The only official information on sales of women's inner fashions and loungewear in specified types of retail outlets is contained in the 1977 Census of Retail Trade. Only stores with payrolls are included in the merchandise line reports and not all store types are required to break down their sales by merchandise category. Due to changes in the classification system, comparative figures for earlier census years are not available.

Brassieres, Girdles & Foundations

Department stores accounted for over 67% of reported sales of women's brassieres, girdles and foundations in 1977. Women's ready-to-wear stores sales of $204.0 million represented 15.3% of the total.

(continued)

Brassieres, Girdles & Foundations (continued)

Reported Sales of Women's Bras, Girdles & Foundations by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number***	% of total	Mil. $	% of total
Bras, Girdles & Foundations	35,239	100.0%	$1,333.8	100.0%
Department stores*	7,884	22.4	894.8	67.1
Women's ready-to-wear stores**	14,820	42.1	204.0	15.3
Family clothing stores	8,807	25.0	169.3	12.7
Children's wear stores	118	0.3	0.7	0.1
Mail order houses	3,610	10.2	65.0	4.8

*Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order house data.

**Detailed data on merchandise line sales of women's accessory & specialty stores (including furriers) were not included in the Census reports. There were a total of 4,962 stores in this classification with total women's and children's wear sales of $858.8 million in 1977.

***Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

#Less than 0.1%

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales, RC77-L.

Lingerie, Sleepwear & Loungewear

In 1977, sales of women's lingerie, sleepwear and loungewear were reported at $2.14 billion in the leading store types. Department stores again took the lions' share with reported sales of $1.48 billion, 69.2% of the total.

Reported Sales of Women's Lingerie, Sleepwear & Loungewear by Store Type, 1977
(includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number***	% of total	Mil. $	% of total
Lingerie, Sleepwear & Loungewear	38,826	100.0%	$2,143.8	100.0%
Department stores*	8,284	21.3	1,483.7	69.2
Women's ready-to-wear stores**	17,637	45.4	357.4	16.7
Family clothing stores	9,187	23.7	214.9	10.0
Children's wear stores	117	0.3	0.9	#
Mail order houses	3,601	9.3	86.9	4.1

(see footnotes on previous table)

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977
Merchandise Line Sales, RC 77-L.

RETAIL SALES BY STORE TYPE

Lingerie, Sleepwear & Loungewear

Contribution of Women's Inner Fashion Sales to Total Women's & Children's Wear in Key Store Types Reporting Sales, 1977

	Total Women's & Children's Wear Sales* (mil. $)	% of sales accounted for by: Bras, Girdles & Foundations	% of sales accounted for by: Lingerie, Sleepwear & Loungewear
Department stores	$16,250.7	5.5%	9.1%
Women's ready-to-wear stores	11,066.5	1.8	3.2
Family clothing stores	3,471.6	4.9	6.2

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977
Merchandise Line Sales, RC 77-L.

Department Stores

The number of firms operating department stores declined to 600 in 1977, according to the Census of Retail Trade, from a total of 866 counted in the 1972 Census, representing a drop of 30.7%. The number of stores operated by these firms increased 13.7% from 7,742 department stores counted in 1972 to 8,807 in 1977. County Business Patterns reports that in 1978 there were 8,546 department stores in operation, down 3.0% from 1977.

Total department store sales in 1980 amounted to $94.2 billion, up from $88.5 billion in 1979, according to the U.S. Census Bureau. In 1979, in the typical department store, 6.7% of total store volume was in inner fashions according to the National Retail Merchants Association.

Sales of the women's intimate apparel departments of department stores with sales of $1 million or more rose in 1979 on median results, for all intimate apparel categories, according to the National Retail Merchants Association. Among these department stores, sales of women's, misses' & juniors' intimate apparel increased 9.2% followed by robes and loungewear with 7.0%.

(continued)

Department Stores/Operating Results

Selected Typical (Median) 1979 Merchandising & Operating Results in Department Stores With Total Annual Sales Over $1 Million

	Adult Female Apparel	Brassieres	Corsets & Girdles	Intimate Apparel, Sleepwear & Robes	Women's, Misses' & Juniors' Intimate Apparel	All Sleepwear	All Robes & Loungewear
Net sales, % change from last year	+ 7.0%	+ 5.9%	+ 4.8%	+ 5.6%	+ 9.2%	+ 2.8%	+ 7.0%
Sales, % to total store sales	+ 36.7	0.9	0.4	2.7	1.2	0.9	0.6
Sales, % of merchandise division*	--	9.5	3.9	27.9	11.8	9.9	6.7
$ sales per square foot of selling space	$107.4	$109.2	$ 97.2	$ 96.9	$103.5	$ 91.4	$ 93.8
Cumulative markon %	50.2%	49.0%	48.9%	50.4%	50.5%	50.5%	50.4%
Gross margin, % of sales including cash discounts	43.6	51.1	50.1	49.7	51.1	49.7	48.5
Markdowns, retail, % of sales	18.2	2.8	4.4	8.4	6.0	8.6	11.3
Returns, % of sales	10.0	--	6.0	8.4	6.1	9.3	12.0
Number of stock turns	4.0	3.0	2.6	3.7	3.4	4.4	4.8
Salespeople's salaries, % of sales	7.2	--	8.5	7.8	8.0	7.5	7.6
Sales promotion, % of sales	3.1	--	2.9	3.1	2.9	3.2	3.2

*The merchandise division (equal to 100.0%) in this case is adult female accessories and intimate apparel.

Source: National Retail Merchants Association,
"Merchandising and Operating Results,"
1980 Edition.

RETAIL SALES BY STORE TYPE

Women's Ready-To-Wear Stores

Large firms, with annual sales of $1 million and over, operated 27.3% of all women's ready-to-wear stores in 1977. These outlets had combined sales of $8.0 billion, or 64.6% of total sales in all sales of this type. Firms with annual sales under $500,000 represented 91.9% of the total number of firms but had only 26.7% of total sales. County Business Patterns reports that in 1978 there were 39,769 women's ready-to-wear stores in operation, down 11.2% from 1977's total of 44,894.

In 1979, the typical women's ready-to-wear store did 7.9% of the total store volume in inner fashions according to the National Retail Merchants Association.

Operating Results

Women's, misses' and juniors' intimate apparel sales jumped a typical 13.1% in 1979 over 1978 intimate apparel sales in specialty stores with sales over $1 million. This was far above the median 6.9% sales increase for all female apparel in specialty stores reported by the National Retail Merchants Association. Two other classifications reported by this source—All sleepwear; intimate apparel, sleepwear & robes—had sales increases higher than the median for all female apparel while the final two— Bras, corsets & girdles; all robes & loungewear—had smaller increases.

Selected Typical (Median) 1979 Merchandising & Operating Results
In Specialty Stores With Total Annual Sales Over $1 Million

	All Female Apparel	Bras, Corsets & Girdles	Intimate Apparel, Sleepwear & Robes	Women's, Misses' & Junior Intimate Apparel	All Sleepwear	All Robes & Loungewear
Net sales, % change from last year	+ 6.9%	+ 6.7%	+ 8.2%	+ 13.1%	+ 11.5%	+ 2.2%
Sales, % to total store sales	64.2	1.3	3.0	1.4	1.2	1.0
Sales, % of merchandise division*	100.0	16.6	33.6	12.1	11.1	11.0
$ sales per square foot of selling space	$145.1	$127.5	$121.2	$136.5	$111.5	$111.3
Cumulative markon, %	50.9%	49.9%	50.5%	51.0%	50.6%	50.3%
Gross margin, % of sales including cash discounts	42.2	49.4	47.1	50.4	48.3	46.5
Markdowns, retail, % of sales	21.9	6.2	13.3	7.8	12.2	14.7
Returns, % of sales	8.5	--	--	--	--	--
Number of stock turns	3.9	2.4	3.8	3.3	4.9	4.8
Salespeople's salaries, % of sales	7.1	--	--	--	--	--
Sales promotion, % of sales	2.3	--	--	2.1	--	--

Source: National Retail Merchants Association, "Merchandising & Operating Results," 1980 Edition.

RETAIL SALES BY STORE TYPE

Family Clothing Stores

The 826 firms operating family clothing stores—which sell apparel for men, boys, women and children—in the U.S. in 1977, which had sales of $1 million or more, represented 5.2% of all firms in this classification. These large firms operated a total of 5,717 family clothing stores which accounted for 72.8% of total family clothing store business in 1977.

Comparable figures for 1972 are not available. However, family clothing store firms with a volume of $500,000 or more in 1977 operated a third of all family clothing stores and accounted for 81.2% of total family clothing store business. In 1972, firms of this size operated 26% of the stores which did 72.3% of total family clothing store business that year.

SEASONAL PATTERN IN RETAIL SALES

The trend is now for the customer to buy clothes to fit her needs in innerwear as well as other types of fashion wear. The heaviest selling period of the year for women's innerwear is during the Christmas season. Except for corsets and brassieres, whose sales are more evenly distributed throughout the year, all of the other innerwear items listed, registered sales of over 20% for the month of December. This is due primarily to the gift appeal of these items.

Percent of Year's Sales of Lingerie,
Foundation & Loungewear Departments By Months
(Five Year Average*)

	Corsets & Brassieres	Underwear, Slips & Negligees, Total	Knit Underwear	Woven Underwear, Slips & Nightgowns	Negligees, Robes & Loungewear
Total	100.0%	100.0%	100.0%	100.0%	100.0%
January	7.7	5.3	6.2	5.1	4.1
February	6.3	5.2	5.4	5.2	5.0
March	8.2	6.0	6.1	6.1	5.9
April	8.5	6.5	6.5	6.7	6.2
May	8.9	8.7	9.6	8.8	8.5
June	9.5	7.4	7.5	7.9	6.6
July	7.9	6.5	6.4	6.8	5.5
August	7.7	6.2	6.4	6.1	5.4
September	8.3	6.3	6.5	6.1	5.8
October	8.6	7.4	7.5	7.3	7.1
November	7.8	10.8	10.1	10.2	12.1
December	10.6	23.7	21.8	23.7	27.8

Source: Newspaper Advertising Bureau
based on Federal Reserve Board
reports (covering 1961-1965).

RETAIL ADVERTISING

Newspaper advertising linage is available for a limited group of innerwear items. In anticipation of holiday gift buying, advertising linage for lingerie, sleepwear and robes is heaviest during November and December. Due to the change of seasons as well as winter fashion sales, advertising linage is also highly concentrated during May. Except for the heavier concentration during the months of December and June, advertising linage for girdles and brassieres is fairly distributed throughout the year.

Percent of Year's Total Newspaper Advertising Linage
By Months for Women's Intimate Apparel, 1979

	Girdles & Bras	Lingerie, Sleepwear & Robes
Total linage	100.0%	100.0%
January	6.5	4.8
February	3.4	5.7
March	9.8	6.0
April	9.5	7.1
May	9.9	14.0
June	12.8	5.1
July	4.2	4.5
August	7.0	5.1
September	8.3	6.3
October	7.7	7.2
November	7.0	14.7
December	13.9	19.5

Source: The Advertising Checking Bureau, Inc.-Neustadt Reports Division, covering retail newspaper advertising linage in all newspapers in seven cities: Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles and Washington.

CONSUMER PRICE TRENDS

Consumer Price Indexes for Selected Women's Innerwear
Annual Averages 1980, 1979, 1978
(12/77 = 100 unless specified)

	1980	1979	1978	% Change 1980/1979	% Change 1980/1979
All apparel less footwear (1967=100)	167.8	158.5	154.2	+ 5.9%	+ 8.8%
All women's apparel	103.1	101.3	99.4	+ 1.8	+ 3.7
Underwear, nightwear & hosiery	113.0	105.6	101.6	+ 7.0	+11.2

Source: U.S. Department of Labor, Bureau of Labor Statistics.

CONSUMER BUYING HABITS

Data on the purchases of specific types of women's inner fashions, shown below, have been compiled by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc., Floral Park, N.Y. This data is based on the findings of an ongoing monthly panel diary, tracking the purchases of 6,500 nationally representative families. (The data for women includes family members 17 years old and older.)

Panties

Percent of Women's Panties Purchases by Type of Outlet, 1980

	Units	Dollars
Total reported purchases	100.0%	100.0%
Department stores	21.9	27.6
Discount stores, incl. K mart	29.1	24.0
National chains	29.4	26.7
Specialty stores	5.1	7.5
Variety stores	6.8	5.7
All others	7.6	8.3

Percent of Women's Panties Purchases by Price Point, 1980

	Units	Dollars
Total Units	100.0%	100.0%
Less than $.75	22.8	9.2
$ .75 - $ .99	21.4	14.3
$1.00 - $1.24	11.7	9.8
$1.25 - $1.49	13.9	14.2
$1.50 - $1.99	16.8	21.5
$2.00 - $2.99	9.4	16.4
$3.00 - $4.99	3.0	8.5
$5.00 & above	1.1	6.1

Percent of Total Panties Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	7.6	7.8	9.0	5.9	7.5	7.4	9.2	8.1	8.0	8.1	10.2	11.1
Dollars	100.0%	7.5	7.5	7.6	5.7	7.7	7.5	8.4	8.7	7.8	8.2	9.4	14.1

Source: NPD Research, Inc.

CONSUMER BUYING HABITS

Slips

As measured by NPD Research, based on the purchase diaries maintained by the panel households, the total market for women's slips amounted to over 19.7 million units in 1980.

Percent of Women's Slip Purchases by Type of Outlet, 1980

	Units	Dollars
Department stores	36.4%	41.7%
Discount stores, incl. K mart	19.1	12.7
National chains	22.4	22.0
Specialty stores	14.8	17.2
All others	7.3	6.4

Percent of Women's Slip Purchases by Price Point, 1980

	Units	Dollars
Total units	100.0%	100.0%
Less than $4.00	26.8	12.1
$4.00 - $5.99	27.8	22.4
$6.00 - $7.99	20.7	22.4
$8.00 - $11.99	16.6	24.3
$12.00 & over	8.1	18.9

Percent of Total Slip Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	5.9	4.3	7.2	9.7	13.1	9.7	8.7	8.5	6.8	5.9	8.3	11.9
Dollars	100.0%	5.5	3.6	6.7	9.6	13.3	10.0	8.7	8.3	6.3	5.6	9.8	12.5

Source: NPD Research, Inc.

Pajamas

NPD projected the market for women's pajamas to be 9,403,000 in 1980 with a retail value of $72.3 million.

(continued)

CONSUMER BUYING HABITS

Pajamas

Percent of Women's Pajama Purchases by Type of Outlet, 1980

	Units	Dollars
National chains	31.7%	30.3%
Department stores	25.0	35.1
Discount stores, incl. K mart	22.3	15.5
Women's specialty stores	11.2	9.8
All others	9.6	9.3

Percent of Women's Pajama Purchases by Price Point, 1980

	Units	Dollars
Total units	100.0%	100.0%
Less than $4.00	29.7	9.5
$4.00 - $5.99	15.8	10.7
$6.00 - $7.99	16.3	15.1
$8.00 - $11.99	20.4	25.6
$12.00 - $15.99	10.4	18.4
$16.00 & above	7.5	20.4

Percent of Total Pajama Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	8.5	4.7	7.1	4.1	8.6	4.8	5.0	4.0	4.4	16.4	14.5	17.9
Dollars	100.0%	8.2	3.3	6.7	3.6	7.8	4.4	4.0	3.7	4.8	13.2	15.8	24.5

Source: NPD Research, Inc.

Negligees

Percent of Women's Negligee Purchases by Type of Outlet, 1980

	Units	Dollars
Discount stores, incl. K mart	33.1%	22.1%
Department stores	28.6	38.0
National chains	18.2	19.8
Specialty stores	10.6	12.0
All others	9.3	8.2

(continued)

Negligees (continued)

Percent of Women's Negligee Purchases by Price Point, 1980

	Units	Dollars
Total Units	100.0%	100.0%
Less than $4.00	16.3	6.3
$4.00 - $5.99	24.5	15.4
$6.00 - $7.99	20.5	17.7
$8.00 - $11.99	21.7	26.0
$12.00 - $15.99	10.2	16.6
$16.00 & over	6.9	17.9

Percent of Total Negligee Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	7.6	7.3	3.9	5.0	7.3	5.1	8.4	5.0	5.1	8.8	14.3	22.2
Dollars	100.0%	7.2	6.7	4.1	4.9	6.8	4.8	7.8	4.6	4.7	8.3	15.7	24.4

Source: NPD Research, Inc.

Robes

Percent of Women's Robe Purchases by Type of Outlet, 1980

	Units	Dollars
Department stores	30.4%	34.6%
National chains	26.6	26.1
Discount stores, incl. K mart	24.0	17.9
Specialty stores	10.4	12.9
All others	8.8	8.2

Percent of Women's Robe Purchases by Price Point, 1980

	Units	Dollars
Total purchases	100.0%	100.0%
Less than $8.00	20.4	8.0
$12.00 - $11.99	19.5	12.8
$12.00 - $15.99	21.0	19.0
$16.00 - $19.99	16.9	19.8
$20.00 - $29.99	15.2	23.7
$30.00 & above	6.9	16.7

(continued)

Robes (continued)

Percent of Total Robe Purchases by Month, 1980

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	8.6	6.8	5.0	4.7	9.6	5.1	7.0	4.0	5.0	6.5	13.1	24.3
Dollars	100.0%	7.8	6.4	3.9	4.1	7.2	3.9	5.3	3.8	5.5	6.3	17.2	28.6

Source: NPD Research, Inc.

The SEVENTEEN Magazine Lingerie, Hosiery and Foundation Study was conducted to acquire information concerning ownership and purchasing characteristics of these garments among teenage girls. Areas of specific interest included types and quantity of lingerie and foundation items currently owned and the types, number and price paid for these items purchased in the last year.

Questionnaires were mailed in May, 1980 to 2,000 members of SEVENTEEN'S Consumer Panel, representing a cross-section of the teen market. The first 818 returns were processed and form the basis of the study.

Teenage Purchase & Ownership of Lingerie & Foundations

	Percent Owning	Average Number Owned	Percent Purchasing	Average Number Purchased	Average Price Paid
Slips	94.9%	4.0	71.8%	2.4	
Half-slips					
Short	82.9	2.1	53.4	1.5	$ 6.63
Long	44.9	1.2	18.1	1.1	7.68
Full-slips					
Short	42.3	1.5	20.4	1.3	8.43
Long	18.5	1.2	8.3	1.1	10.25
Camisoles	24.0	1.4	16.9	1.2	7.19
Bra slip	8.1	1.5	5.0	1.4	8.73
Tap/dance pants	7.5	1.6	5.5	1.4	6.64
Dirndle or circular petticoat	3.5	1.2	1.6	1.0	9.83
Petti-culotte	1.8	1.6	0.6	1.4	7.57
Panties	97.9	15.8	89.6	10.2	
Bikini					
Regular	83.2	12.3	71.4	8.3	2.78
String	8.8	3.5	6.1	2.2	2.88
Regular brief	57.3	7.8	43.5	6.5	2.73
Sleepwear/loungewear	97.2	9.0	80.9	3.9	
Robes					
Long	80.6	1.6	41.7	1.9	13.18
Short	36.6	1.4	28.0	1.8	9.33

(continued)

Teenage Purchasing & Ownership of Lingerie & Foundations
(continued)

	Percent Owning	Average Number Owned	Percent Purchasing	Average Number Purchased	Average Price Paid
Sleepwear/loungewear (continued)					
Nightgowns					
Long	71.1%	3.0	36.3%	1.2	$20.64
Short	54.6	2.6	13.0	1.1	14.22
Nightshirts					
Short	57.8	2.5	33.4	1.9	8.06
Long	17.1	1.4	9.9	1.4	10.21
Pajamas					
Full length	37.0	1.8	17.7	1.3	12.34
Shortie	29.1	2.4	11.9	1.6	9.10
Lounging pajamas	9.7	1.3	5.0	1.2	16.14
Caftan	4.3	1.1	1.3	1.4	19.38
Bras	96.8	7.6	89.9	4.6	
Bandeaux					
Seamless	37.0	1.8	34.4	2.4	7.03
Softcup	71.1	3.0	30.8	2.5	6.33
Light padded	57.8	2.5	27.3	2.5	6.27
Full padded	17.1	1.4	2.8	2.3	6.69
Front closing	36.6	1.4	32.4	2.0	6.76
Strapless	80.6	1.6	27.9	1.2	6.61
Underwire	29.1	2.4	20.0	2.1	8.30
One-size (stretch step-in)	4.3	1.1	9.7	1.8	5.31
Bodysuit					
Sized	9.2	2.4	6.6	1.6	10.49
One size	5.9	1.9	3.3	1.9	8.79
Stretch coordinated sets (bra & brief)	5.0	3.0	6.1	1.8	9.33
Halter	9.7	1.3	5.7	1.4	5.22
Body briefer (all-in-one)	2.2	1.4	1.2	1.4	12.35
Girdles					
Panty					
Brief	6.0	1.6	3.7	1.5	6.33
Short leg	0.7	1.8	0.4	1.0	6.44
Long leg	0.6	2.0	0.1	1.0	11.00
Regular	1.1	1.1	0.4	1.0	12.25
Garter belt	1.2	1.2	0.7	1.2	6.30

Type of Store Where Innerwear & Sleepwear Is Purchased *
(Base: All Girls)

	Foundations	Lingerie	Sleepwear
Department stores	83.2%	81.2%	78.5%
Boutique/specialty stores	9.2	10.5	11.2
Discount stores	6.0	8.2	9.0
Hosiery/lingerie stores	6.7	8.7	3.1
Variety stores	2.4	2.2	3.5
All other	1.6	3.2	4.9
Don't know	2.9	3.4	4.2

*Total adds to more than 100.0% due to multiple answers

Source: SEVENTEEN Magazine,
Lingerie, Hosiery and Foundation Study,
1980.

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store type.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S)—1981: A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) on number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

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